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FRUIT Situation

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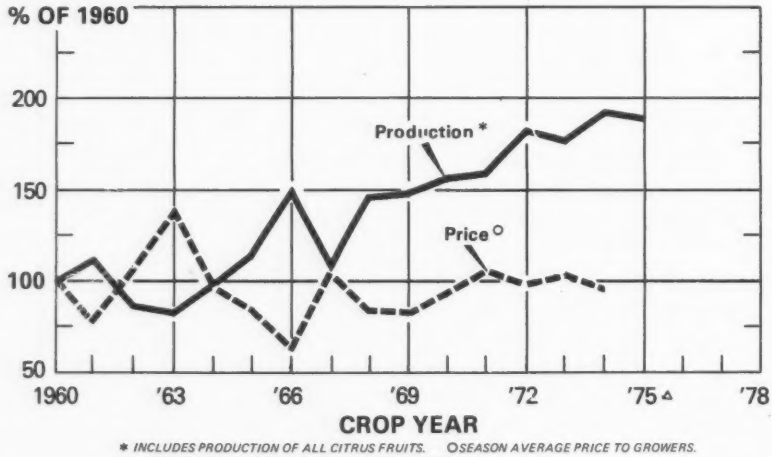
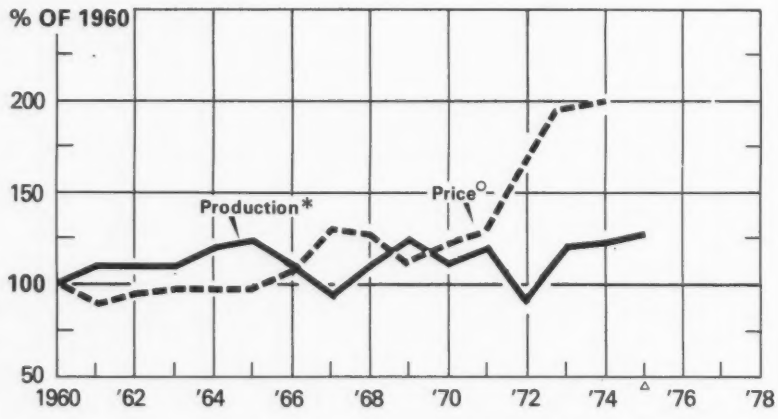
CITRUS FRUIT PRODUCTION AND PRICES



* INCLUDES PRODUCTION OF ALL CITRUS FRUITS. ○SEASON AVERAGE PRICE TO GROWERS. PRICE WEIGHTED BY PRODUCTION. △PRELIMINARY.

USDA NEG. ERS 2042-75 (10)

NONCITRUS FRUIT PRODUCTION AND PRICES



*15 IMPORTANT FRUITS. ○SEASON AVERAGE PRICE TO GROWERS. PRICE WEIGHTED BY PRODUCTION. △PRELIMINARY.

USDA NEG. ERS 8485-75 (10)

THE FRUIT SITUATION

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SUMMARY

Large Fruit Supplies Exert Downward Pressure on Prices

With large fresh and processed fruit supplies anticipated in 1975/76, prices at all levels are expected to decline through early winter. However, as the economy strengthens, consumer demand for fresh and processed fruit is likely to increase which might help offset some of the downward pressure on prices.

If the October 1 prospects are realized, U.S. citrus production for 1975/76 will be nearly as large as the record 1974/75 crop. The orange crop is expected to be smaller. Industry reports indicate that the lemon crop also is expected to be well below last year. But record crops are indicated for grapefruit, tangerines, Temples, and tangelos. Noncitrus fruit tonnage is estimated 5 percent larger than last year's utilized levels. The increase is due primarily to the larger apple and grape crops.

The September index of prices received by growers for fresh and processed fruit increased moderately to 157 (1967=100), up from 147 in August and 3 percent above the year-earlier level. However, during the fourth quarter the index is expected to decline seasonally to a level slightly to moderately below a year ago as grower prices for fresh apples, pears, grapefruit, and tangerines move lower in response to increased supplies. The retail fresh fruit price index, which declined moderately from August to September, and is expected to continue down during the fourth quarter, but is still likely to average slightly above a year ago.

In response to large supplies, wholesale prices of most processed noncitrus fruit items have weakened. The BLS September wholesale price indexes for both canned and dried fruit were slightly to moderately below year-earlier levels. Reflecting the decline in wholesale prices, retail prices of processed fruit, particularly canned noncitrus items, have also weakened, but are still moderately above last year's high level. However, as the economy strengthens during the months ahead, demand for processed fruit items could increase. Thus, the potentially larger demand combined with expected increases in marketing costs could dampen the downward pressure on retail prices during 1975/76.

The first forecast of U.S. orange production for the 1975/76 season points to a crop 3 percent below last season's record. Prospects are off in all producing areas except Texas. In Florida, total orange production is placed at 172 million boxes, down 1 percent from the record crop last season. Early and mid-season varieties in Florida are up 1 percent, but this is more than offset by a decline of 4 percent in Florida Valencias. In California, Navel and Valencia oranges are down 11 percent and 15 percent, respectively, from last season's output.

Demand for frozen concentrated and chilled orange juice, which has been very strong during 1974/75, is likely to continue to gain in 1975/76. Current prospects for oranges through this winter point to grower prices slightly higher than a year earlier, in view of lower carryover stocks of processed items, expected strong demand, plus a slightly smaller orange crop.

A record grapefruit crop is being forecast, up substantially from last season and somewhat above the previous high set in 1973/74. In the absence of strong processor demand and in view of the record crop in prospect, grower returns for grapefruit could be moderately below last year.

Shipping point f.o.b. prices for apples, grapes, and pears so far this season have generally been moderately to substantially lower than last year. Available supplies for fresh market sales are expected to be larger this season since crops are larger and processor demand is weaker due to the larger carryover stocks of many processed noncitrus items. Consequently, f.o.b. prices for fresh noncitrus fruit are likely to continue moderately to substantially below year-earlier levels through this fall and early winter.

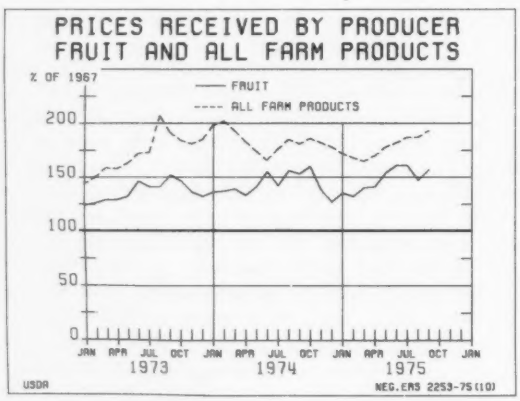
The 1975/76 pack of canned noncitrus fruit is running smaller than last season's large output. However, even with a small reduction in expected pack, the total supply of canned fruit this season will still be large because of the size of canner stocks on hand at the beginning of the season. Supplies of dried fruit are also expected to be up while frozen fruit supplies could be below last season.

The deal for tree nuts is similiar. Production of the four major edible tree nuts—almonds, filberts, pecans, and walnuts—put at 465,100 tons, one-tenth above last year's utilized crop. Walnuts, filberts, and pecans are forecast much larger and more than offset the sizable decline in almond production. However, total almond supplies are slightly greater than in 1974/75 since inventories were substantially larger at the beginning of this season. Thus, combined with expected larger foreign output, prices for tree nuts this season are likely to average moderately below 1974.

RECENT DEVELOPMENTS AND OUTLOOK

GENERAL PRICE OUTLOOK

The index of prices received by growers for fresh and processed fruit so far this year has fluctuated from a low of 132 (1967=100) in February to a high of 161 in both June and July, and generally averaged moderately above year-earlier levels. Higher prices have been reported for apples, peaches, strawberries, and grapefruit.



The September index of 157 was up moderately from August and 3 percent above year-earlier levels. However, grower prices for fresh apples, oranges, and grapefruit will decline seasonally this fall in response to the increase in supplies. Consequently, the price index in the fourth quarter may be slightly to moderately below a year ago. However, the 1975 index of prices received by growers for fresh and processed fruit will still be near year-earlier levels.

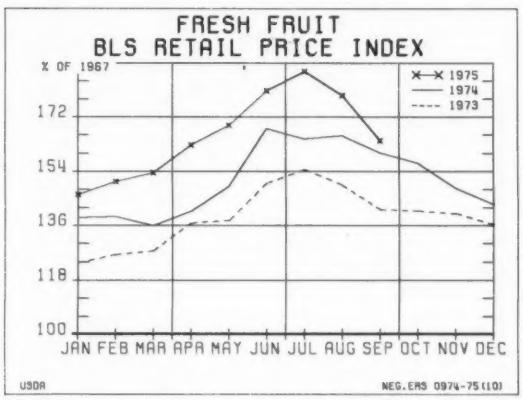
The 1975 contract prices negotiated for most noncitrus fruit for processing use are below year-earlier levels, which will pull down the 1976 grower

Table 1—Index of quarterly prices received by growers for fresh and processed fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1972	106	114	119	120
1973	126	136	145	138
1974	137	143	150	142
1975	136	152	155	

price index. Grower prices for fresh apples, grapefruit, and tangerines are expected to remain moderately to substantially below a year ago during the first half of 1976. The declines will more than offset the expected higher prices for lemons, oranges, and pears. Thus, the index of prices received by growers for fresh and processed fruits could average slightly to moderately below the comparable 1975 period during the first half of 1976.

The retail fresh fruit price index has declined from the record high of 187.1 in July (1967=100). The September index dropped 8 percent from August to 164, but was still 2 percent above a year ago. The decrease in retail fresh fruit prices was mainly attributed to lower prices for apples, bananas, and grapes. As larger supplies of fresh apples and citrus become available this fall, retail prices of fresh fruit are expected to continue to decline seasonally but are still likely to average slightly above a year ago. For all of 1975, the index will average moderately higher than for 1974. Retail prices of most fresh fruit during the first half of 1976 will increase seasonally but may average slightly below the comparable 1975 period.



In response to large supplies, wholesale prices of most processed fruit items have weakened. The BLS September wholesale price index for canned fruit at 166 (1967=100) was slightly below a year ago. A wholesale price index moderately lower than a year ago was also recorded for dried and dehydrated fruit, but the frozen fruit and juice price index has still remained materially above year-earlier levels. With larger supplies, wholesale prices of some processed noncitrus fruit items are expected to decline further. Reflecting the decline in wholesale prices, retail prices of processed fruit, particularly canned noncitrus items, have also weakened, but are still moderately above a year ago.

Table 2—Quarterly wholesale price indexes for canned fruit

Year	(1967=100)			
	1st	2nd	3rd	4th
1972	112.4	114.6	115.5	111.0
1973	119.6	121.3	124.3	131.7
1974	136.0	140.8	163.6	170.4
1975	170.3	170.7	167.3	

Larger available supplies of fresh fruit and stocks of many processed fruit items are expected to exert further downward pressure on prices. However, demand for processed fruit items could strengthen as the economy recovers during 1975/76. A reduced rate of inflation and unemployment will boost disposable personal income. Some of this money will be spent on processed fruit items. Thus, increased demand combined with the continued increases in costs of marketing could dampen the downward pressure on retail prices.

CITRUS FRUIT

The first forecast of U.S. citrus production for the 1975/76 season points to a crop nearly as large as the record 1974/75 crop. Citrus production (excluding California lemons and grapefruit in California other than desert areas) for the new season is estimated at nearly 13.6 million tons, down only slightly from 1974/75 and nearly 7 percent above 1973/74. While orange and lemon production is expected to be smaller, record crops are currently indicated for grapefruit, tangerines, Temples, and tangelos.

Oranges

Slightly Smaller Crop

October 1 prospects point to a 3 percent decrease in total U.S. orange production during the 1975/76 season. The lower output is mostly due to the 6 percent reduction in the U.S. Valencia crop. While below last season's record 10.2 million tons (237.8 million boxes), the 1975/76 total orange crop is still 6 percent above the crop of 2 years ago.

Prospects are down in all producing areas except Texas. Florida, with about 78 percent of the prospective U.S. orange crop, has 7.7 million tons (172 million boxes), down 1 percent from the record crop of last season. Early and mid-season varieties in Florida are up 1 percent, but this is more than offset by a decline of 4 percent in Florida Valencias. The growers' marketing season for Florida early and mid-season varieties is usually September 15 to April 1, while Valencia oranges are marketed from February 1 to early July.

In California, Navel oranges at 25 million boxes are down 11 percent, and Valencia oranges at 23 million boxes are 15 percent below 1974/75 levels.

Table 3—Citrus fruit: Production, 1973/74, 1974/75, and indicated 1975/76[1]

Crop and State	Boxes			Ton equivalent		
	Utilized		1975/76	Utilized		1975/76
	1973/74	1974/75		1973/74	1974/75	
	1,000 boxes[2]	*1,000 boxes*[2]	*1,000 boxes*[2]	*1,000 tons*	*1,000 tons*	*1,000 tons*
Oranges:						
Early, Midseason and Navel varieties[3]:						
California	21,900	28,000	25,000	821	1,050	938
Florida	92,100	96,600	98,000	4,145	4,347	4,410
Texas	4,200	2,930	3,800	179	125	162
Arizona	450	920	900	17	35	34
Total	118,650	128,450	127,700	5,162	5,557	5,544
Valencias:						
California	18,500	27,000	23,000	694	1,013	863
Florida	73,700	76,700	74,000	3,317	3,452	3,330
Texas	2,400	1,610	2,000	102	68	85
Arizona	2,960	4,050	3,100	111	152	116
Total	97,560	109,360	102,100	4,224	4,685	4,394
All Oranges:						
California	40,400	55,000	48,000	1,515	2,063	1,801
Florida	165,800	173,300	172,000	7,462	7,799	7,740
Texas	6,600	4,540	5,800	281	193	247
Arizona	3,410	4,970	4,000	128	187	150
Total oranges	216,210	237,810	229,800	9,386	10,242	9,938
Grapefruit:						
Fllorida, all	48,100	44,600	50,000	2,045	1,896	2,126
Seedless	38,100	37,400	41,000	1,620	1,590	1,743
Pink	12,200	11,500	13,000	519	489	553
White	25,900	25,900	28,000	1,101	1,101	1,190
Other	10,000	7,200	9,000	425	306	383
Texas	10,700	7,300	10,000	428	292	400
Arizona	2,050	2,770	2,900	66	89	93
California	4,650	6,400	[4] Dec. 1	153	208	[4] Dec. 1
Desert Valleys	2,360	3,700	3,200	76	118	102
Other areas	2,290	2,700	[4] Dec. 1	77	90	[4] Dec. 1
Total grapefruit	65,500	61,070	[4] Dec. 1	2,692	2,485	[4] Dec. 1
Lemons:						
California	14,900	22,200	[4] Nov. 1	566	844	[4] Nov. 1
Arizona	2,900	7,200	3,800	110	274	144
Total lemons	17,800	29,400	[4] Nov. 1	676	1,118	[4] Nov. 1
Limes:						
Florida	1,050	1,100	1,150	42	44	46
Tangelos[5]:						
Florida	3,700	4,700	5,000	167	212	225
Tangerines:						
Florida	2,800	3,100	4,800	133	147	228
Arizona	680	610	650	26	23	24
California	1,360	1,540	1,400	51	58	53
Total tangerines	4,840	5,250	6,850	210	228	305
Temples:						
Florida	5,300	5,300	5,500	239	239	248
Total[6]	297,210	319,730	318,200	12,769	13,634	13,627

[1] The crop year begins with bloom of the first year and ends with completion of harvest the following year. [2] Net content of box varies. Approximate averages as are follows: Oranges-California and Arizona, 75 lbs.; Florida, 90 lbs.; Texas 85 lbs.; Grapefruit-California, Desert Valleys, and Arizona, 64 lbs.; other California areas, 67 lbs.; Florida, 85 lbs.; and Texas 80 lbs.; Lemons, 76 lbs.; Limes-80 lbs.; Tangelos-90 lbs.; Tangerines-California and Arizona, 75 lbs.; Florida, 95 lbs.; and Temples-90 lbs. [3] Navel and miscellaneous varieties in California and Arizona. Early and Midseason varieties in Florida and Texas, including small quantities of tangerines in Texas. [4] Month indicates crop report containing data. [5] Excludes K-early citrus fruit. [6] Excludes both California grapefruit in "other areas" and lemons.

California Navels are usually marketed from November 5 to June 20, and the later Valencia oranges from March 15 to December 15.

The Texas orange forecast is up 28 percent from last year's short crop which was damaged by a freeze in December 1973. Orange prospects in Arizona are 20 percent less than last season.

Utilization and Value of the 1974/75 Crop

Fresh sales of U.S. oranges were up sharply to nearly 2.1 million tons (54 million boxes), or about 21 percent of total output during 1974/75.

Traditionally, much of the California orange crop is utilized by the fresh market. Last season about 72 percent of the State's Navels and 54 percent of the Valencias were sold fresh. Because of the record crop and good quality fruit, fresh use of all California oranges amounted to nearly 35 million boxes, up from 29 million during 1973/74. Florida's fresh sales also increased sharply and amounted to more than 13 million boxes, about 8 percent of the crop. Some further increase in fresh movement from Florida is expected this season because of the smaller California crop.

With record supplies, U.S. average grower prices for fresh and processed oranges were estimated at $1.63 per box (equivalent on-tree return) in 1974/75, down from $1.69 the previous season. Total value of orange sales last season was put at a record $641 million.

The season average price for all oranges from Florida was up slightly during 1974/75 to $1.52 per box. Slightly lower returns for early and mid-season varieties were more than offset by a moderate increase for Valencias.

California orange prices during 1974/75 averaged $2.03 per box, substantially less than in 1973/74 as a result of the larger crop.

Strong Export Demand

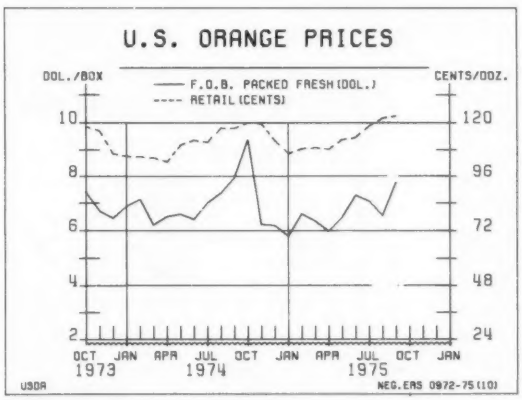
Export demand for fresh oranges strengthened considerably during the 1974/75 season. Exports during the first 11 months of the season (November 1974 through September 1975) totaled 507 thousand tons or 14.5 million boxes, 49 percent above the similar period last season and 43 percent above the total shipped during 1973/74. With orange production off slightly in the Mediterranean region last season, U.S. shipments to Europe were up sharply. Shipments to Canada, the major export market for fresh oranges, also increased substantially.

Export shipments of U.S. oranges during 1975/76 may not match the high level of 1974/75 for a number of reasons. First, trade reports indicate larger orange supplies from the Mediterranean region, especially Spain and Israel. Larger supplies of competing fresh noncitrus fruit, especially apples, in the Northern Hemisphere are also likely to weaken foreign demand for oranges. In addition to the slightly smaller domestic crop being forecast and anticipated slightly higher price, the recent appreciation of the U.S. dollar on foreign exchange markets will increase the cost of U.S. oranges to foreign buyers if the dollar remains firm.

Market Prospects

Price behavior during the 1975/76 season will depend on a number of factors. Acting to push prices up will be moderately lower carryover stocks of frozen concentrated orange juice at the beginning of this season. In addition, increased consumer disposable income and the lower unemployment rate being forecast for the months ahead should stimulate demand for both fresh and processed items. On the other hand, prices for oranges could be dampened by the large available supplies of competing fresh fruit during 1975/76, particularly apples and, to some extent, grapefruit. Also, export shipments during 1975/76 are likely to fall below last year's high level.

Consequently, current prospects for oranges through the winter point to grower prices declining seasonally but averaging slightly above year-earlier levels. If the 6 percent smaller U.S. Valencia crop is realized, grower prices could advance to levels moderately above a year ago later in the season. These price increases can be expected to show up at the retail level.



Grapefruit

Record Crop in Prospect

Supplies for 1975/76 are expected to total 2.7 million tons or 66.1 million boxes (for California, includes Desert Valley fruit only), up nearly 14 percent from last season and 4 percent above the previous record set in 1973/74. The large crop this sea-

son is due to substantial increases in output in Florida and Texas.

Florida's grapefruit crop is forecast at an all-time high 2.1 million tons or 50 million boxes, 12 percent above last season and 4 percent above the previous record crop harvested in 1973/74. Supplies of both pink and white seedless varieties will be moderately larger. In Texas, prospects point to a 37 percent larger crop. Last season's crop in Texas was reduced as a result of bloom damage from the December 1973 freeze. Texas fruit quality is reported excellent this season.

Utilization and Value of the 1974/75 Crop

In spite of the moderately smaller U.S. grapefruit crop in 1974/75, fresh market sales remained relatively stable at 1.1 million tons, while processing use declined about 14 percent to 1.3 million tons. The value of production increased slightly to just under $160 million due to higher average prices.

The average U.S. grower price (equivalent on-tree return) for all grapefruit was up from $1.61 per box during 1973/74 to $1.86 per box last season. Grower prices for fresh grapefruit were up sharply and averaged $3.22 per box, while returns for processing were off substantially to 70 cents per box. Large stocks of processed grapefruit products at the start of the 1974/75 season and lagging movement of canned grapefruit juice weakened processor demand, causing lower returns to growers for processed grapefruit.

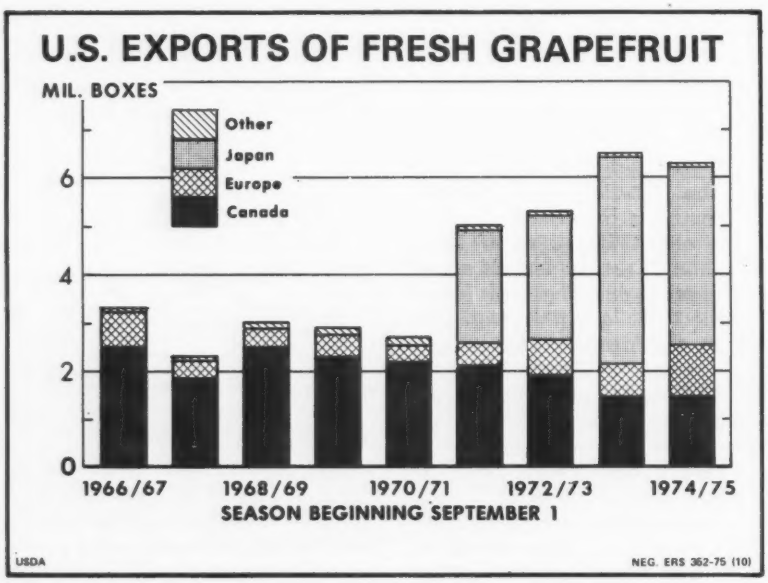
Exports Level Off

Export shipments of 6.2 million boxes during 1974/75 registered a slight decline from the record 6.5 million boxes the previous season. While shipments to Canada and Europe increased, U.S. exports to Japan declined about 14 percent. Shipments to Japan started later last season and totaled nearly 3.7 million boxes, compared with 4.3 million in 1973/74. Consequently, Japan's share of total U.S. exports declined from 66 percent during 1973/74 to 59 percent last season. U.S. exports are expected to resume their upward trend during the 1975/76 season in view of the record domestic crop, likely lower market prices, and strong foreign demand.

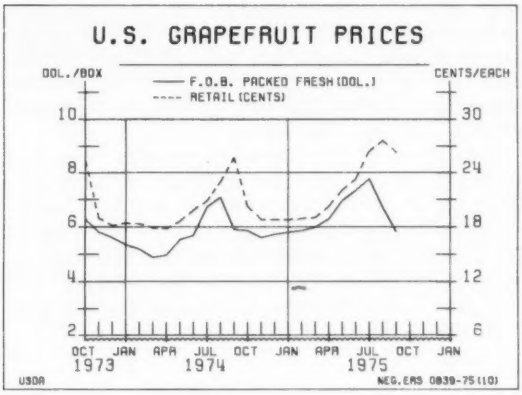
Market Prospects

Processor demand for the new crop remains somewhat uncertain. Although carryover stocks of most processed grapefruit products are lower going into the 1975/76 season, movement of canned juices and sections has been discouraging the last couple seasons. However, more chilled and frozen concentrated grapefruit juice was marketed during 1974/75.

Domestic movement of fresh grapefruit during 1975/76 is expected to expand and exports may also register a moderate gain over 1974/75. The export market will be one of the key factors determining whether 1975/76 will be a banner year for growers. In Florida, total fresh shipments through mid-October were slightly higher than last year, while movement to processors was off substan-



tially. Early season export shipments from Florida were up sharply. F.o.b. fresh grapefruit prices on this early-season volume were near to slightly higher than last season. In the absence of strong processor demand and in view of the record crop in prospect, prices for grapefruit are expected to decline to levels moderately below last year. However, improved export prospects this season may curtail downward pressure on grapefruit prices.



Lemons

Smaller Crop in Prospect

October 1 prospects indicate Arizona's lemon crop will total 3.8 million boxes, down 47 percent from last season's record high. The USDA forecast for California, which produced a record 22.2 million boxes last season, will be issued on November 10, 1975. However, industry reports indicate the California crop will be well below last year.

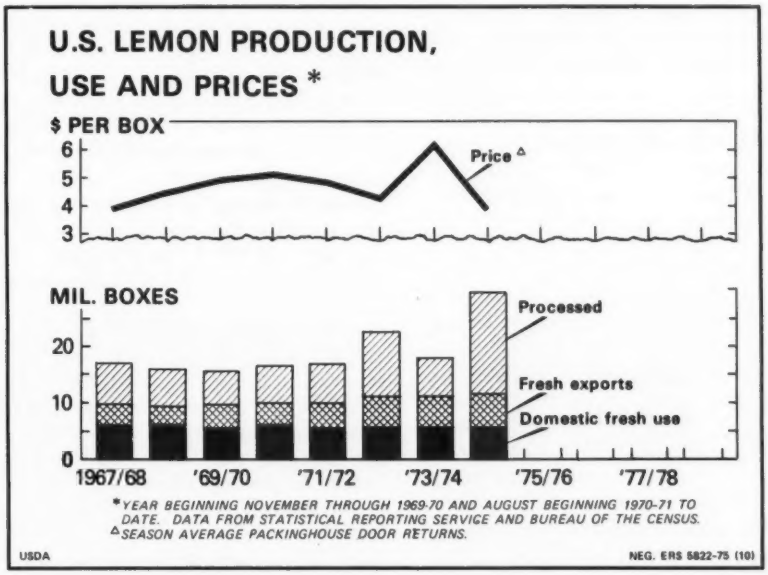
Total movement this season through mid-October was much lower than a year ago. Although domestic fresh shipments were about the same as a year ago, fresh lemon exports and deliveries to processors were down sharply. F.o.b. prices for fresh lemons have increased substantially above last season's levels, and through mid-October averaged about 20 percent above the same period last year. Prices during 1975/76 are expected to remain substantially above last season's low level, but are not likely to average as high as 1973/74.

During 1974/75, about 40 percent of the 29.4 million box U.S. lemon crop was sold to fresh market outlets. Total fresh use was nearly 5 percent larger than in 1973/74, with exports up moderately while domestic fresh use remained relatively stable. Processing use increased sharply to 17.8 million boxes in 1974/75, up from 6.7 million boxes the previous year. In view of the record crop last season, the season average price received by growers dropped from $6.17 per box (packinghouse-door return, all use) in 1973/74 to a low of $3.85.

Other Citrus Fruits

Record Supplies Indicated

The first forecast of U.S. tangerines is placed at a record high 305,000 tons or 6.8 million boxes, more than a third above 1974/75. Florida and Arizona each expect larger crops, while supplies from California will be smaller.



The Florida tangerine crop is expected to total 4.8 million boxes of 210 size or larger, 55 percent above last season. Harvesting of the new crop in Florida started in late September, and is expected to peak in December. F.o.b. prices so far this season averaged slightly below year-earlier levels through mid-October. Prices are expected to remain slightly to moderately below last season's level in view of the record prospective crops of tangerines and other specialty citrus fruits.

Tangerines are primarily a fresh market crop, with 70 percent of the 1974/75 crop shipped to fresh market outlets. Despite a larger crop, the season average all use price to U.S. growers during 1974/75 was virtually unchanged at $3.03 per box (equivalent on-tree return). Slightly higher returns for fresh market outlets offset lower returns for processing use. In addition, grower returns increased in Florida, while California-Arizona growers received less for their 1974/75 crop (table 15).

Florida's Temple crop is forecast at a record 5.5 million boxes, up from the 5.3 million boxes harvested the past 2 seasons. The marketing season generally starts early in December and is completed by May. Nearly two-thirds of the crop was processed during the past 2 seasons. The 1974/75 average grower price was down sharply to $1.18 per box (equivalent on-tree). The decline was due to the substantial drop in returns for processing use, while grower returns for fresh Temples declined only slightly.

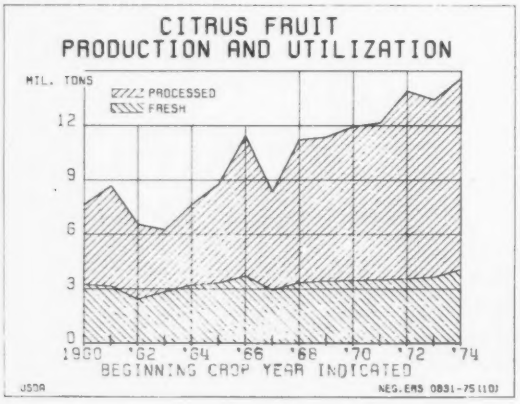
Harvest of Florida's 5 million box tangelo crop got underway in October. The 1975/76 crop is currently forecast 6 percent above the previous record set last season. While the number of bearing trees showed almost no change, fruit per tree and fruit sizes are expected to be larger than last season. This season's shipping point prices opened moderately below last year's level.

Utilization of the 1974/75 tangelo crop was about equally divided between fresh and processed. Shipments to fresh market outlets were up substantially, while processing use was only slightly larger. Although grower returns for fresh use increased last season, the average price for all uses was $1.16 per box (equivalent on-tree), down from $1.25 during 1973/74.

PROCESSED CITRUS

Processing Use Record Large

Utilization of the 1974/75 U.S. citrus crops for processing was a record 10.5 million tons, up 8 percent from the preceding season. Increases in processing use of oranges and lemons were largely responsible. Processors accounted for 72 percent of total citrus sales in 1974/75, about the same as the preceding season. More than three-quarters of the oranges sold in the U.S. were processed, as were 54 percent of the grapefruit and three-fifths of the lemons.



Processing use of citrus varies widely among States. Florida's record orange crop resulted in increases for both fresh and processing utilization. Processing accounted for 92 percent of Florida oranges marketed. The share of processing oranges used for frozen concentrated orange juice, at 81 percent, remained relatively stable, while the share used for chilled juice increased slightly to 14 percent. Florida's smaller grapefruit crop resulted in a corresponding decline for processing use. The share of Florida's grapefruit used for processing fell from 61 percent during 1973/74 to 58 percent last season. Fresh sales remained unchanged, but accounted for a larger share of the smaller grapefruit crop.

With a large orange crop in California during 1974/75, both processing and fresh uses were up sharply. Processors used 37 percent of the orange crop, compared with 27 percent during 1973/74. About 56 percent of California's record lemon crop was used for processing, compared with 37 percent during 1973/74. Processing use continued to account for nearly half of California's grapefruit output.

Arizona also moved larger than normal shares of its citrus crop to processors. Nearly three-quarters of the Arizona lemons, half the grapefruit, and two-fifths of the oranges were used for processing. The smaller grapefruit and orange crops in Texas last season resulted in sharp decreases in fruit moved to processors. Slightly more than one-third of the grapefruit crop was processed compared with half in 1973/74, and less than half the oranges went to processors compared with two-thirds the year before.

Table 4—Oranges, grapefruit, and tangerines processed, Florida, 1970/71 through 1974/75[1]

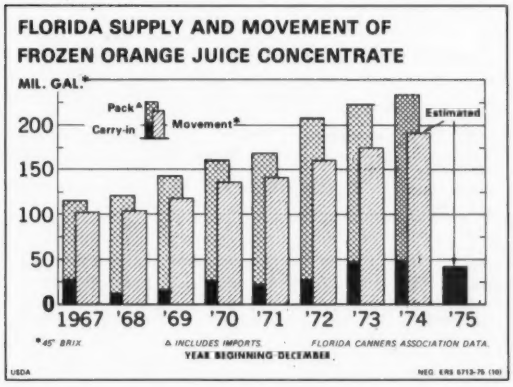
Crop and season	Frozen concentrates	Chilled products		Other processed[3]	Total processed
		Juice	Sections and salads		
	1,000 boxes	*1,000 boxes*	*1,000 boxes*	*1,000 boxes*	*1,000 boxes*
ORANGES:[2]					
1970/71	103,521	19,772	703	8,834	132,830
1971/72	104,399	19,509	535	7,726	132,169
1972/73	132,210	20,465	654	8,949	162,278
1973/74	132,469	20,405	605	7,518	160,997
1974/75	135,512	22,761	526	7,580	166,379
GRAPEFRUIT:					
1970/71	6,819	2,348	1,091	17,682	27,940
1971/72	8,725	3,206	994	17,036	29,961
1972/73	8,212	2,908	1,209	16,025	28,354
1973/74	8,732	2,715	1,118	16,804	29,369
1974/75	7,779	3,332	967	13,725	25,803
TANGERINES:					
1970/71	1,000	---	---	39	1,039
1971/72	961	---	---	11	972
1972/73	961	---	---	21	982
1973/74	732	---	---	13	745
1974/75	889	---	---	---	889

[1] 1974/75 preliminary. [2] Include tangelos, temples, and honey tangerines. [3] *Oranges* and *grapefruit*, include cannery juice, blend, sections, and salads; and *tangerines*, include mostly blend products.

Frozen Concentrates

Movement Continues To Expand Moderately

The total supply of Florida frozen concentrated orange juice (FCOJ) continued to expand during 1974/75, increasing slightly from the 223.8 million gallons available during 1973/74. A record pack of 178.2 million gallons of Florida FCOJ was recorded in the 1974/75 season, up slightly from the previous season's output. In addition, the packers' carryin stock of FCOJ at the beginning of the 1974/75 season was slightly larger, and imports also increased (table 16).



Despite the larger supply of FCOJ, current stocks are slightly below a year earlier since demand for frozen concentrate has been strong. Total movement of FCOJ continues to increase this season, with shipments through mid-October nearly 9 percent more than a year ago. Current prospects indicate the carryover at the end of this season may be approximately 45 million gallons, down from 48.9 million the previous season.

Export shipments of FCOJ continued to advance moderately during 1974/75 and prospects are favorable for 1975/76. Brazil, the leading foreign supplier of FCOJ, is reported to have a sharply smaller orange crop because of unfavorable weather during the growing season.

Effective October 13, list f.o.b. prices for frozen concentrate increased slightly from $2.10 to $2.20 per dozen 6-ounce can (unadvertised brands). With promotional allowances this past summer, the effective selling price was $1.98 during July through mid-August. Prices at the retail level held relatively stable the past several months, but the September price of 28.2 cents per 6-ounce can was up moderately from 25.8 cents during September 1974.

Although Florida's prospective orange crop is smaller, the total pack of FCOJ in 1975/76 is expected to be near the 1974/75 level as juice yields are up. Juice yields are projected at 1.35 gallons of 45° brix concentrate per box, up from 1.31 gallons during 1974/75. With the anticipated lower stocks on hand at the beginning of the 1975/76 season, total supplies of FCOJ probably will be slightly below year-earlier levels.

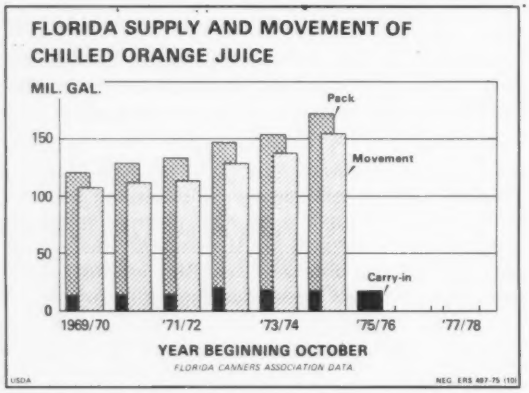
Excluding reprocessed gallonage, the 1974/75 pack of frozen concentrated grapefruit juice was 7.8 million gallons, compared with 9 million the previous season. But with a sharply larger carryin at

the beginning of season, total supplies during 1974/75 were about the same as the previous year. Movement so far this season through mid-October was one-tenth above last year, so current stocks are down moderately. However, supplies are likely to increase during 1975/76 in view of the substantially larger grapefruit crop in prospect.

Chilled Citrus Juices

Demand Continues to Increase

Retail prices for chilled orange juice continued to advance slightly during the 1974/75 season, averaging 53.6 cents per quart in September 1975, up from 51.3 cents for the same month a year earlier. Product movement continued to expand during 1974/75, increasing 12 percent to 154 million gallons. However, packer stocks at the end of the season were up slightly.



Although the prospective orange crop is smaller in Florida, the pack of chilled orange juice during 1975/76 is expected to increase because of increased consumer acceptance in recent years.

Movement of chilled grapefruit juice during 1974/75 reached a record 20.8 million gallons, 16 percent above 1973/74. The increase in movement more than offset gains in total supplies; as a result packer stocks of Florida chilled grapefruit juice dropped 12 percent to 1.4 million gallons at the end of the 1974/75 season. However, the large grapefruit crop in prospect should result in a record pack, increasing total available supplies during 1975/76.

Canned Citrus

Movement of Florida canned citrus products during 1974/75 was down slightly from the previous year and nearly one-tenth below 1972/73. The largest decline was recorded for canned grapefruit juice and sections (table 18). Despite the lower movement, canners' stocks of most items at the end of the 1974/75 season were down sharply from the high levels of a year ago, with the notable exception of canned grapefruit sections.

The total supply of canned citrus products, particularly grapefruit, is likely to be ample during 1975/76 in view of the large prospective grapefruit crops in Florida and Texas. In order to improve sales and avoid potentially burdensome stock levels for canned grapefruit items, some price cuts are likely for these items during 1975/76.

FRESH NONCITRUS

The 1975 noncitrus fruit crop is forecast at 11.7 million tons, 5 percent above last year's utilized level and 7 percent above 1973. The increase is due primarily to the larger output of apples and grapes. Cold storage holdings of fresh noncitrus fruit at the beginning of October were only slightly above year-earlier levels since harvest started about 2 weeks later than last year. However, stocks will be substantially above a year ago after the completion of harvest, not only because of larger crops, but also because of slackening processor demand. Thus, larger supplies of noncitrus fruit will be available for fresh markets for the remainder of this season and prices received by growers are expected to average below the 1974/75 season.

Table 5—U.S. noncitrus fruit: Production, 1973, 1974, and indicated 1975

Crop	Utilized		1975
	1973	1974	
	1,000 tons	*1,000 tons*	*1,000 tons*
Apples	3,113	3,221	3,625
Apricots	158	94	138
Cherries, sweet	154	144	154
Cherries, tart	87	132	145
Cranberries	101	106	113
Grapes	4,193	4,194	4,278
Nectarines	86	115	100
Peaches	1,302	1,441	1,480
Pears	724	736	741
Prunes and plums	758	667	624
Strawberries	239	267	269
Total	10,915	11,117	11,667

Apples

Record Crop Expected

The October 1 forecast of the 1975 U.S. commerical apple crop is 7.2 billion pounds, down nearly 1 percent from the August forecast but 13 percent above the 1974 utilized production. Since August 1, prospects improved slightly in Western States but

declined 2 percent in Eastern States. The following table shows the 1975 apple crop by regions, compared with the utilized apple production for 1973 and 1974.

Larger crops are reported for every State in the East except New Jersey. New York, the leading apple State in this region, expects a record crop of 1.1 billion pounds, up almost one-fifth from last year. Likewise, a larger apple crop is expected for every State in the Central region except Minnesota. Michigan, the major apple producing State in the region, expects a crop of 720 million pounds, 7 percent above 1974. The Western region also expects a larger output in every State except Oregon. Washington, the No. 1 U.S. apple producing State, expects a record 1.9 billion pounds, 7 percent above a year ago.

Table 6—Apples: Regional production, 1973, 1974, and indicated 1975

Area	Utilized		Indicated
	1973	1974	1975
	Billion pounds	*Billion pounds*	*Billion pounds*
East	2.49	2.77	3.16
Central States	.88	1.11	1.30
West	2.85	2.56	2.78
Total U.S.	6.22	6.44	7.24

Market Prospects and Prices

Because of a record crop, shipments of fresh apples are running substantially ahead of last year's pace. The record apple crop combined with reduced processor demand, particularly in the East and Midwest, will result in substantially larger supplies available for the fresh market than a year ago. Weakening processor demand is mainly attributed to the largest carryover of canned apples and applesauce in recent seasons.

Opening f.o.b. prices for fresh apples were generally below last year at major shipping points. Prices have continued to fall to levels moderately to sharply below a year ago. Mid-October quotations for Red Delicious apples by major producing areas are shown in the table below.

Shipping points	Mid-October F.O.B. prices		Units
	1975	1974	
Western Michigan	4.00	5.50	Per carton, U.S. Fancy, 2¼" up, 12-3-lb. film bags.
Appalachian District	3.75	5.44	Cartons, U.S. Fancy or better 12-3-lbs, film bags, 2¼" up.
Yakima Valley, Washington	6.00	7.28	Per carton, tray pack, Wash., State Extra Fancy, 80-125's.

Large supplies of fresh apples combined with a large prospective citrus crop could exert some additional downward pressure on apple prices through this fall and early winter. In addition, foreign demand for our fresh apples does not look favorable. Apple production in Western Europe for 1975 is expected to be nearly 11 percent above 1974. Output in the two key exporting countries, France and Italy, is up 19 percent and 8 percent, respectively, from a year ago. Production in West Germany, a key importing country on the Continent, is up nearly a third from last year's short harvest. Export prospects to Canada, an important destination, may be off somewhat as the Canadian apple crop is expected to be the largest in the last several years. A record apple crop from Washington is likely to cause apple prices later in the season to average moderately to subtantially below the unusually high levels attained last season.

With f.o.b. prices moderately to substantially below a year ago, the 1975/76 retail prices of fresh apples could average below the high levels of the 1974/75 season. The BLS September retail price of fresh apples fell to 37.4 cents per pound from 44.1 cents in August, and is now only slightly above last year.

The larger apple crops from the Eastern and Central States combined with slackening processor demand have also weakened the market for processing apples. Offering prices for apples to be used in processing have been sharply below a year ago. Many processors in the East have agreed to pay $1.50-$3.00 per hundredweight (cwt.) for processing variety apples, U.S. No. 1 canner grade, 2½ inches and up, delivered to processors. Last year's initial prices ranged from $6.25 to $7.00 per cwt. In Michigan, processors have agreed to pay growers $3 per cwt. for 2½ inches and up, hard varieties. In the West, apple prices for processing use are also considerably lower than last year. In California, processing apples are quoted between $65 and $85 per ton, depending on variety and size.

Grapes

Slightly Larger Grape Production

U.S. grape production is forecast at 4.3 million tons, 2 percent above both the 1973 and 1974 crops. California's output, accounting for 90 percent of the U.S. crop, is up 2 percent from last year. Larger crops of wine and raisin varieties more than offset smaller output of table varieties. Potential output in California is expected to continue to increase during the next few years as recently planted acreage reaches bearing age.

Total grape production from States other than California is now estimated at 427,750 tons, up almost 6 percent from the 1974 utilized crop. A 26 percent larger crop is expected in Michigan, while

Table 7—Grapes: Production in principal States, 1973, 1974 and indicated 1975

State	1973	1974	1975	State and variety	1973	1974	1975
	Tons	*Tons*	*Tons*		*Tons*	*Tons*	*Tons*
New York	128,000	177,000	155,000	California:			
New Jersey	1,050	1,000	950	Wine	1,036,000	1,214,000	1,350,000
Pennsylvania	40,000	53,000	47,000	Table	475,000	617,000	500,000
Ohio	13,000	15,500	18,000	Raisin	2,376,000	1,958,000	2,000,000
Michigan	23,500	47,500	60,000	Dried[1]	224,000	240,000	---
Missouri	1,800	1,500	4,000	Not dried	1,409,000	942,800	---
North Carolina	3,400	3,100	3,300	All	3,887,000	3,789,000	3,850,000
Georgia-South Carolina	6,600	5,500	6,700				
Arkansas	8,000	8,000	10,500	United States	4,193,150	4,194,100	4,277,750
Arizona	11,600	12,500	12,300				
Washington	69,200	80,500	110,000				

[1] Dried basis. 1 ton of raisins is equivalent to 4.32 tons of fresh grapes for 1973 and 4.23 for 1974.

Washington prospects are up 37 percent. New York and Pennsylvania, however, are slated for reductions of 12 percent and 11 percent, respectively.

Market Prospects and Prices

Through mid-October, shipments of fresh grapes totaled 14,813 carlots compared with 13,772 during the same period last season. Shipping point prices for most California grapes have been declining seasonally, and by mid-October Thompson Seedless grapes were below year-earlier levels, although Ribier were still higher. In Kern County, California, Thompson Seedless was quoted at $5.80 per 23-pound lug, 11 percent less than a year earlier, while Ribier was quoted at $5.50 per 23-pound lug, compared with $5.25 last year.

Supplies of grapes available for fresh market are expected to be larger this season since the market for competing uses of table and raisin varieties, particularly Thompson Seedless, is expected to decline. Thus, with a larger supply of Thompson Seedless available for fresh market, fresh grape prices may remain moderately below a year ago.

Demand for fresh grapes so far this season has been good as total unloads through mid-October were 11 percent above last season. But retail prices were still near year-earlier levels, even with the larger supplies of Thompson Seedless grapes available for fresh market. In September, U.S. retail prices of fresh grapes averaged 58.6 cents per pound, up from 58.2 cents a year ago. Foreign demand for U.S. fresh grapes is off somewhat. Exports during the first 4 months of the 1975/76 season (June-September) amounted to 43,057 tons, a decrease of nearly one-tenth from the same period of 1974/75.

In spite of a larger crop, the field price for raisins in California has been settled between growers and processors at $647.50 per ton. This is a $7.50 increase over the 1974 field price.

Winery prices to growers this season have been below last year's levels. As expected, prices varied greatly by producing areas and varieties of grapes. In early October, the crushing price for Thompson Seedless in most areas was mostly $55 per ton, with no sugar stipulated, compared with $60 to $65 per ton a year ago. In the East, prices of some Concord grapes used for wine have also been established at levels moderately to substantially below a year ago. Prices paid to growers ranged from $110 to $220 per ton. Substantially lower prices for juice grapes have also been established. In New York, Pennsylvania, and Ohio, the processors have paid growers about $150 per ton compared with $180 last year.

Drying May be Larger But Crushing Lagging

Because of the lateness of the 1975 season, raisin deliveries to handlers are running considerably behind those of a year ago. As of October 11, deliveries totaled 60,039 tons, less than half for the same period last season. However, with a larger raisin grape crop and reduced demand from wineries, total production of Natural Thompson raisins is expected to be above last year's levels. The larger pack combined with a sizable carryover will boost supplies of raisins moderately during the 1975/76 season.

Reported use of California grapes for crushing through mid-October was 1.4 million tons (fresh basis), down substantially from 1.7 tons during the same period last season. This was almost three-fifths below levels of 2 years ago. The largest decrease was recorded for wine variety grapes, which accounted for 50 percent of crusher receipts, up only slightly from a year ago. The lag in grape crushing is a result of larger inventories of wine and slow sugar buildup in wine varieties. Many wineries in California have indicated that their crush will be smaller this season than last due to the larger carryover of wine and current market conditions. Inventories of wine in California as of June 30, 1975 were reported at nearly 295 million

gallons, 5 percent greater than last year. Prices for bulk wine have been weak and in mid-October were moderately to substantially below last year's low level.

Pears

Production Up Slightly

The Nation's final forecast of the 1975 pear crop at 740,750 tons is up slightly from the 736,240 tons utilized last year, and 2 percent above 1973. Oregon and Washington expect smaller crops while all other States anticipate larger output than a year ago. The Pacific Coast's Bartlett pear crop is forecast at 516,000 tons, up 4 percent from last year's utilized production as larger crops were reported in all three West Coast States. West coast production of pears other than the Bartlett variety, most of which are fall and winter varieties, is estimated at 171,500 tons, down 16 percent from last year's record utilized crop. All three States expect lower production. Pear output in other than Pacific Coast States is estimated to be up two-fifths from last year, due to substantially larger crops from Michigan and New York.

Fresh Shipment Down Sharply

With harvest of Bartletts later than last season, fresh pear shipments from the Pacific Coast States through mid-October have been running sharply less than last year. Shipments from Oregon started considerably later than last year—411 carlot equivalents moved compared with 2,370 last year. However, Washington's movement was up 15 percent and California's has gained moderately.

F.o.b. fresh Bartlett prices at Lake County District, California and Yakima Valley, Washington have been substantially below year-earlier levels. The following table shows f.o.b. quotations for Bartlett pears at these two shipping points as well as D'Anjou pear f.o.b. prices at Yakima Valley, Washington.

Shipping points	Mid-October F.O.B. prices		Units
	1975	1974	
Lake County Dist., California:			
Bartlett	7.54	9.00	US No. 1, std. box wrapped pack, 90-150's.
Yakima Valley Washington:			
Bartlett	6.50	8.00	Boxes, wrapped, US No. 1, 90-135's
D'anjou	6.50	6.50	

The lower prices are primarily caused by larger available supplies of Bartlett pears for fresh market since processor demand is weak because of larger carryover stocks of canned pears. Consequently, sharply larger stocks of Bartlett pears have built up in cold storage (about 104,420 tons on October 1, up 26 percent from a year ago). In view of the large cold storage stocks of Bartletts, prices are likely to remain substantially below a year ago through this fall.

A factor which may keep prices firm later this season is the potentially favorable market situation abroad. The 1975 pear crops in major exporting countries such as France, Italy, and Spain are expected to be moderately to substantially less than last year's small crops. In addition, the expected substantial decline in winter pear production in the Northwest may firm the late-season market.

Exports Down

The pear crop in the European Economic Community is expected to be 12 percent below 1974. This could enhance our prospects for pear exports to the EEC this season. However, prospective exports to Canada, an important destination, are less favorable as a slightly larger Canadian pear crop is expected. Exports of fresh pears during July through September 1975 amounted to 17.8 million pounds, 15 percent below the same period a year ago.

Avocados

Avocados available for shipment from Florida during the 1975/76 season are estimated at 960,000 bushels, 18 percent above the record 1974/75 season. Additional acreage of high yielding varieties and better cultural practices account for most of the increase in production.

Shipments so far this season to the end of September at 369,100 bushels are running well ahead of last season's 243,900 bushels for the same period. Unusually early fruit maturity and good fruit sizes appear to be the principal contributing factors. However, even with a substantial increase in shipments, f.o.b. prices for avocados at south Florida points averaged only slightly below a year earlier. In mid-October, shipping point prices for Florida avocados, Greenskin varieties, size 8-16, were quoted at $4.06 a flat, compared with $4.25 a year ago.

The first forecast for the 1975/76 California avacado crop is 2,544,000 bushels, down 38 percent from the previous season, but still one-fifth above 1973/74. The 1975/76 marketing season began November 1. Demand for avocados is very strong and total unloads of fresh California avocados at 41 major cities during the 1974/75 marketing season were running about 86 percent above a year ago through mid-October.

Bananas

U.S. imports of bananas during January-September 1975 at 3.1 billion pounds were down slightly from 3.3 billion a year ago. The decrease was mainly attributed to a sharp drop in imports from Honduras (approximately 72 percent) as a result of Hurricane Fifi's damage to banana plantations during the summer of 1974. Honduras supplied nearly one-third of our banana imports during the first 9 months of 1974, while it is accounting for only 14 percent this year. However, imports from Honduras have reached 82 million pounds in July, up from a low of 18 million pounds in February.

Because of larger total imports during July and August, retail prices of bananas have declined substantially from the record high of 26 cents per pound in June. However, the September price of 21.9 cents per pound was still 7 percent above a year ago. The prospective increase in banana supplies, combined with larger supplies of domestic fresh fruit, could exert further downward pressure on retail prices of bananas.

Cherries

Sweet Cherries

Total U.S. sweet cherry production in 1975 was 154,310 tons, 7 percent above 1974. The increase in production was primarily due to the larger crops in California, Michigan, New York, and Oregon. The New York crop was four times as large as the small 1974 crop. Washington, the leading sweet cherry State, produced 43,000 tons, down almost 5 percent from last year. Its share of the total U.S. crop declined from 31 percent in 1974 to 28 percent.

Despite a larger crop, prices received by growers for the 1975 sweet cherry crop averaged $510 per ton, up from $504 a year ago. Substantially to sharply higher prices were reported in all Western States except California, Colorado, and Oregon. However, prices of sweet cherries received by Michigan and New York growers averaged sharply lower in response to larger crops.

The larger 1975 sweet cherry crop resulted in nearly one-fifth larger shipments to fresh markets, while movement to processors decreased slightly. The following table shows the utilization of the U.S. sweet cherry crop during the last 5 years.

Tart Cherries

The 1975 tart cherry crop totaled 145,250 tons, up one-tenth from 1974. Michigan, the leading State, produced 111,000 tons, up almost 8 percent from last year. New York, the second leading State, produced 13,700 tons, more than two-thirds over 1974. Combined production from these two States accounted for 86 percent of the total U.S. crop.

Only 85 percent of the 1975 tart cherry crop was utilized, which included a total of 12,800 tons initially placed in the Reserve Pool. Table 9 shows the utilization of tart cherries during the last 5 seasons.

Grower prices for the 1975 tart cherry crop averaged $200 per ton, way under the $370 a year ago, with lower prices reported for each State. Contributing to the sharply lower prices were heavy carryover stocks of canned and frozen tart cherries. Processors were not as active as last year when the trade attempted to refill normal distribution channels.

Cranberries

The 1975 production of cranberries in the five producing States is estimated at 2.25 million barrels, 1 percent more than last year's total production. This output ranks second to the record production of 2.26 million barrels in 1971. Smaller crops in New Jersey and Wisconsin are more than offset by larger crop prospects in Massachusetts, Oregon, and Washington.

Shipping point prices at Cape Cod, Massachusetts opened near year-earlier levels at mostly

Table 8—Sweet cherries: Production, utilization, price, and value, 1971-75 crops

Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Brind	Other[3]		
	Thou. tons	*Thou. tons*	*Thou. tons*	*Thou. tons*	*Thou. tons*	*Thou. tons*	*Dol.*	*Thous. dol*
1971	141.3	140.0	68.6	11.4	59.0	1.0	316	44,215
1972	95.2	95.0	41.7	7.2	43.3	2.9	385	36,582
1973	157.6	153.6	82.8	13.0	53.9	3.9	367	56,395
1974	143.6	143.6	66.6	14.8	51.5	10.6	504	72,367
1975	154.3	154.3	78.5	9.5	61.2	5.1	510	78,685

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] Some totals do not add to rounding. [3] Includes frozen, juice, jelly, etc.

Table 9— Tart cherries: Production, utilization, price, and value, 1971-75 crops

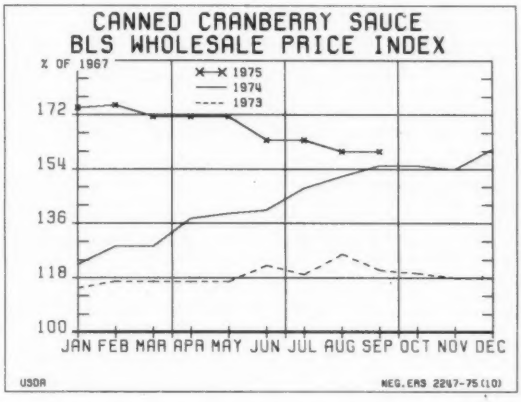
Crop	Production[1]		Utilization				Price per ton	Value of utilized production
	Total	Utilized[2]	Fresh	Processed (fresh equivalent)				
				Canned	Frozen	Other[3]		
	Thou. tons	*Thou. tons*	*Thou. tons*	*Thou. tons*	*Thou. tons*	*Thou. tons*	*Dol.*	*Thou. dol.*
1971	139.9	139.3	5.6	37.3	92.4	4.0	199	27,689
1972	155.8	134.2	3.1	41.9	83.1	6.1	163	21,934
1973	87.6	87.0	2.6	23.5	57.5	3.4	377	32,776
1974	132.4	132.3	2.2	44.9	81.3	3.9	370	48,890
1975	145.2	123.1	3.6	40.8	74.6	4.1	200	22,501

[1] Difference between total and utilized is excess cullage and quantities not harvested for economic reasons. [2] 1975 utilized production includes quantities set aside in reserve pool, but excluded in computing value. [3] Includes juice, wine, jam, etc.

$5.50 for Early Blacks, 24 1-pound film bags. However, season opening prices for fresh Massachusetts cranberries in both New York and Chicago wholesale markets were moderately to considerably higher than a year earlier, although they have since declined.

F.o.b. prices for canned cranberry sauce have been declining moderately since last February. But the BLS wholesale price index for canned cranberry sauce (No. 300 can) averaged 159.7 (1967=100) for September 1975, 3 percent above a year earlier.

This fall, USDA bought 407,000 cases of canned cranberry sauce (No. 10 can, six per case), for distribution under child nutrition programs.



PROCESSED NONCITRUS

Even with a moderately larger noncitrus crop, the 1975/76 pack of most noncitrus fruit is likely to be below that of a year ago. However, total supplies of canned and dried noncitrus items are still expected to be above that of a year ago because of larger carryover stocks at the beginning of the season, while frozen fruit supplies could be moderately below a year ago. In response to larger supplies, wholesale prices of canned and dried fruits have declined to levels below a year ago. But prices of frozen fruit have remained materially above year-earlier levels.

Canned Supplies Large

The 1975/76 pack of most noncitrus fruit will probably be moderately below last year's. Since the pack season started later, pack data for most canned noncitrus items are not available at this writing. However, on the basis of data on fruit movement to canners, receipts of clingstone peaches by California processors this season totaled 712,262 tons, down from 791,817 tons last year for the same period. Packers' receipts of Bartlett pears this season are estimated at 219,867 tons, a decrease of 7 percent from last season.

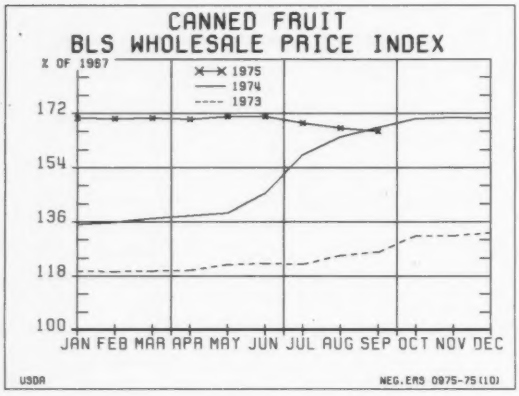
Complete pack data for canned noncitrus items available so far this season indicate that the total pack of canned apricots amounted to 4.4 million cases (24 No. 2½'s), compared with the 1974 near all-time low pack of 2 million. Thus, the total supply of canned apricots for 1975/76 is almost twice as much as a year ago.

With a pack of 1.3 million cases (24 No. 2½'s), 7 percent above a year ago, the total supply of canned tart cherries is 12 percent more than last season. However, the supply of canned sweet cherries is moderately below year-earlier levels because of a substantial decrease in pack.

Carryover stocks of canned apples and applesauce were the largest in recent seasons, and the big apple crop in major processing areas will assure large supplies of canned apple products. However, the season's pack is likely to be smaller than a year ago. In September, the USDA announced the purchase of 990,000 cases of canned applesauce (6/10's) and 136,000 cases of canned apple juice (12/No. 3 cyl.) for distribution through child nutrition programs.

In response to larger supplies, wholesale prices of canned fruit have declined to levels below a year ago. The September BLS index of wholesale

canned fruit prices declined to 166 (1967=100) from 167.2 in August, and was slightly below a year ago. As a result of the lower wholesale prices, retail prices of canned fruit also declined, but they are still moderately above a year ago. However, as the economy recovers, demand for canned fruit items is likely to strengthen. The increased demand combined with higher costs of marketing could dampen the downward pressure on retail prices of canned fruit items.

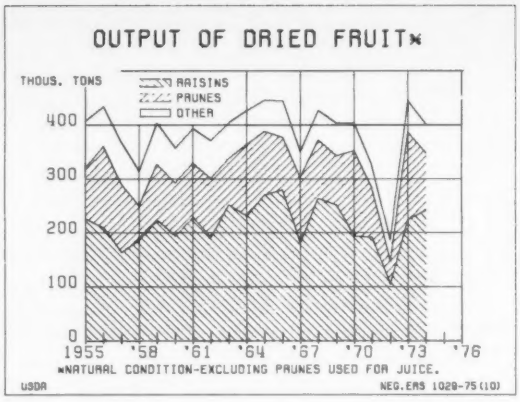


Exports of canned noncitrus fruit so far this season have shown a mixed pattern. Exports increased sharply from a year ago for canned cherries and fruit cocktail, held about the same for canned pears, and dropped for peaches and pineapple. As economic recovery continues around the world, our exports of canned noncitrus fruits are expected to grow more favorable. However, the recent currency devaluation of South Africa, a major foreign exporter of canned fruit to Europe, will enhance their competitive position relative to U.S. exporters. Another concern to our canned fruit exporters is the recent adoption by the European Community of a system of minimum import prices and special import licensing provisions.

Dried Fruit

U.S. dried fruit production for the 1975/76 season is expected to total above that of last season. Early season industry estimates indicate that California may produce 270,000 tons of raisins, 12 percent more than last year. Production of dried prunes, the other major dried fruit item, is estimated at 145,000 tons, slightly above last year.

Supplies of dried prunes for the 1975/76 season will be ample. Since USDA has announced that none of the 1975 marketable prune crop in California be set aside as reserve, the total supply of dried prunes for 1975/76 will be moderately above a year ago, even with a materially smaller carryin at the beginning of the season.



Dried prune shipments have been sharply above last season. During the first 2 months of 1975/76, domestic shipments were running sharply above the corresponding period a year ago and exports were more than twice as much as a year ago. Export prospects for 1975/76 are very bright as foreign prune production in 1975 is estimated at 32,300 tons, 37 percent below 1974. A mild winter followed by late frosts during blossom ruined the 1975 French dried prune crop. The 1975 French crop is estimated at 500 tons, a small fraction of the record 1974 crop of 22,000 tons. Thus, a sharp decrease in French dried prune output will enhance our exports to the European market.

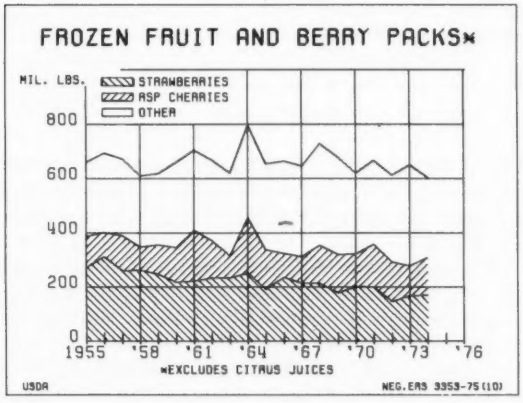
With the expected pack above year-earlier levels plus the substantially larger carryin for this year, the total supply of raisins will be substantially above last season. Domestic demand for raisins is expected to remain good. Domestic shipments of raisins for 1974/75 were one-fifth above 1973/74. However, foreign demand for raisins during 1975/76 is not very promising as the 1975 foreign raisin production is estimated at 328,700 metric tons, 7 percent above 1974. Larger raisin crops in Australia, Iran, and Turkey more than offset the decline in Greece. Total U.S. raisin exports for 1974/75 amounted to 55,347 tons, 11 percent above 1973/74.

USDA has proposed the following marketing regulation for 1975 California raisins: 48 percent of the raisin crop for reserve and 52 percent free tonnage to be released immediately for the 1975/76 marketing season.

The BLS wholesale prices of dried prunes and raisins have been below a year ago. The September wholesale price for dried prunes was $8.58 (16-ounce package, case of 24), compared with $9.65 a year ago. The September wholesale price of raisins was $11.28 (15-ounce package, case of 24), 8 percent below the comparable period a year ago. The average price for raisins and dried prunes during 1975/76 are expected to remain below a year ago in view of the ample supply.

Frozen Fruit Pack Near Year-Earlier Levels

The U.S. pack of frozen deciduous fruits and berries this year is expected to be near the 1974 pack of 604 million pounds. So far this season, receipts of domestic strawberries by California freezers totaled 108.3 million pounds through October 11, slightly more than 105 million pounds a year ago. However, imports of frozen strawberries were 98.4 million pounds for the first 9 months of 1975, a 27 percent decrease from a year ago.



Supplies of processed Mexican berries are relatively small since Mexican growers were reluctant to plant because of the lack of good nursery stock and adequate financing. Fresh harvesting is expected to start later and full harvesting is not expected to take place until March or April of next year. Furthermore, export permits have not yet been issued by the Mexican government for commodities which contain sugar.

Despite a larger crop, the freezers' pack of red tart cherries will be moderately below last year. The smaller pack was due primarily to a substantial reduction in Michigan because of the weather and rot problems experienced. As a result, the Cherry Administrative Board announced a limited offering of reserve pool cherries during early November.

Through mid-October, freezers' receipts of blackberries from Oregon and Washington were sharply below year-earlier levels, but those of blueberries were only moderately less than a year ago due primarily to the considerably smaller receipts from New Jersey.

Smaller Cold Storage Stocks

Cold storage stocks of frozen fruits and berries (excluding juices) on October 1 totaled 574 million pounds, 7 percent smaller than a year earlier. Sharp decreases in three items were chiefly responsible: strawberries at 165 million pounds were down 14 percent; apples, 38 million pounds, off 31 percent; and peaches, 36 million pounds, 37 percent smaller.

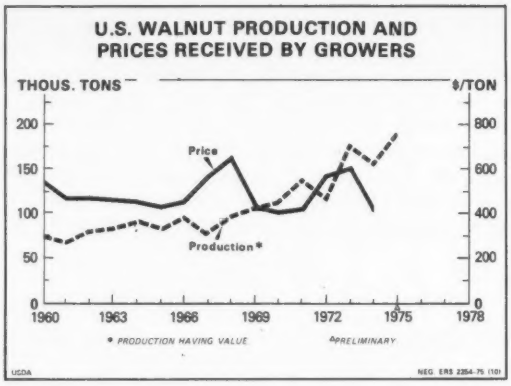
Despite a substantial decrease in frozen stocks, the BLS wholesale price of frozen strawberries has been steady at $4.22 per dozen 10-ounce packages since September 1974. Prices are expected to increase if the supply of frozen strawberries from Mexico continues small.

Table 10—Stocks of frozen fruit: End of September, 1972-75

Frozen fruit	1972	1973	1974	1975
	Thousand pounds	*Thousand pounds*	*Thousand pounds*	*Thousand pounds*
Apples	23,051	20,948	54,734	37,974
Apricots	14,705	13,989	13,940	13,966
Blackberries	17,733	11,468	17,384	20,229
Blueberries	34,751	52,524	50,042	35,512
Boysenberries	3,709	4,573	5,200	6,566
Cherries	122,674	71,960	93,738	123,760
Grapes	4,814	2,885	2,990	3,714
Peaches	41,014	55,911	58,171	36,481
Raspberries, Red	15,366	19,345	21,711	28,651
Raspberries, Black	1,853	1,845	2,220	2,771
Strawberries	143,751	165,162	191,769	165,347
Other frozen fruits	92,247	96,055	106,463	98,878
Total frozen fruits	515,668	516,665	618,362	573,849

Production Up Moderately from 1974

The Nation's 1975 production of four major edible tree nuts— almonds, filberts, pecans, and walnuts—is estimated at 465,100 tons (in-shell basis), one-tenth above last season and slightly above 1973. A sharp decrease in almond production is expected, but the other three major tree nut crops are forecast much larger than last year.



Walnut Crop Largest of Record

Production of walnuts in California and Oregon is forecast at 191,200 tons. This is 22 percent more than last year and 9 percent above the previous record set in 1973. With an inventory near last year's high level, supplies of walnuts will be large during the 1975/76 marketing year (August 1-July 31).

The Walnut Control Board administers the federal marketing agreement and order program covering walnuts. It has recommended to the Secretary of Agriculture that one-third of the 1975 walnut crop grown in California and one-sixth of the Oregon crop be diverted from the domestic market during the 1975/76 marketing year. The surplus will go into noncompetitive outlets, primarily the export trade. The allocation is intended to provide a sufficient quantity of walnuts to meet domestic requirements and have a desirable year end carryover.

According to early reports, foreign walnut production will also be up sharply from last year's low level. With favorable weather this season, production in France, Italy, and India is reported to have increased. The larger available foreign supply may dampen prospects for signficant increases in U.S. exports of walnuts.

Turning to the domestic market, grower prices for walnuts may be adversely affected by the larger supplies of competing tree nuts. The step up in domestic shipments of inshell walnuts last year was due in part to the shortage of Brazil nuts. This shortage caused mixers to increase the percentage of walnuts in their product. However, the Brazil nut crop is larger this year and U.S. imports in recent months were up sharply from a year ago.

In view of larger domestic and foreign supplies of both walnuts and competing edible tree nuts, grower prices during 1975/76 are not expected to average above the level of a year earlier.

Table 11—Tree nuts: Production in principal States, 1973, 1974, and indicated 1975

Crop and State	1973	1974	Indicated 1975	Crop and State	1973	1974	Indicated 1975
	Tons	*Tons*	*Tons*		*Tons*	*Tons*	*Tons*
Almonds:				Pecans:			
California	134,000	192,000	140,000	North Carolina	800	1,100	1,100
Filberts:				South Carolina	1,000	1,250	1,750
Oregon	11,700	6,400	12,300	Georgia	50,000	29,000	37,500
Washington	550	300	500	Florida	3,300	1,250	2,500
2 States	12,250	6,700	12,800	Alabama	20,500	5,500	12,000
				Mississippi	11,000	1,500	3,500
				Arkansas	3,000	600	1,750
Walnuts, English:				Louisiana	20,000	1,500	14,000
California	174,000	155,000	190,000	Oklahoma	14,000	1,250	14,000
Oregon	1,000	1,500	1,200	Texas	10,000	19,000	27,500
2 States	175,000	156,500	191,200	New Mexico	4,250	6,600	5,500
				Total	137,850	68,550	121,100
Macadamia nuts:							
Hawaii	6,062	6,875	n.a.	Improved varieties[1]	72,000	42,800	59,850
				Native and seedling	65,850	25,750	61,250
				Total 4 tree nuts	459,100	423,750	465,100

[1] Budded, grafted, or topworked varieties.

n.a.—Data not available temporarily.

Pecan Crop Larger

As of October 1, U.S. production of pecans in 1975 is expected to total 121,100 tons, up 77 percent from last year's "off year" crop. All producing States except New Mexico and North Carolina expected larger outputs. The October 1 forecast was down 7 percent from September 1. Prospects declined in Florida, Mississippi, and Alabama as a result of Hurricane Eloise which uprooted trees and blew off nuts in several areas. In addition, insect and disease damage lowered crop prospects from September 1 in the major producing States of Georgia, Oklahoma, and Texas. Nearly half of this year's U.S. pecan crop is comprised of improved varieties, down from 62 percent last season.

Carryover stocks of pecans at the beginning of this season were substantially smaller than in 1974, partially offsetting the increase in total production. Consequently, prices paid to growers early in the season are expected to average near year-earlier levels. However, after the distribution pipelines are refilled, supplies may hold prices slightly below last year. Prices received by U.S. pecan growers averaged 47.1 cents per pound last season, up from 36.7 cents in 1973.

Filbert Crop Up Substantially

Filbert production in Oregon and Washington is estimated at 12,800 tons, 91 percent above last year's short crop and slightly more than in 1973. Oregon expects to harvest 12,300 tons, nearly double the level in 1974.

Foreign production of filberts is forecast slightly above the 1974 record harvest. The increase reflects the unusually large 1975 Turkish harvest, substantially above any previously recorded crop. Smaller crops are indicated for Spain and Italy.

This is the fourth consecutive year that Turkish producers have exceeded or equalled their previous year's output. This development is significant in that the Turkish production cycle has traditionally been characterized by year-to-year fluctuations. The past 4 years seem to indicate that Turkish producers have either employed improved production techniques or have enjoyed continued favorable weather or a combination of both.

If the current rate of production continues, there will likely be a surplus of filberts on the world market, with subsequent low prices. World filbert output has increased 49 percent since 1971. Most of this increase is attributed to the sustained high production levels in Turkey.

Increases in both domestic and foreign supplies are likely to lower U.S. price prospects for new-crop filberts. Last season, filbert growers received an average price of $560 per ton at first delivery point, a decrease of 5 percent from 1973.

Almond Crop Down

California's almond output is expected to total 140,000 tons in-shell (165 million pounds of meats), substantially below last year's record output. However, total supplies are slightly greater than in 1974/75 because of the substantially larger inventory at the beginning of this season.

Regarding this season's market allocation, USDA has designated the entire almond crop as saleable with no reserve percentage announced.

Although the California almond crop is smaller this year, foreign production is up slightly over a year ago. The increase is due almost entirely to a substantially higher, although still less-than-normal, harvest in Italy. Production in Iran is also expected to increase, while decreases are forecast in Portugal and Spain. In view of the considerable shelled carryover in the U.S. and prospects for a good foreign almond crop, there will be ample supplies of shelled almonds in 1975/76.

U.S. exports for 1974/75 increased substantially, reacting to the late season surge in demand for nuts and the reluctance of other major producers to export at current world prices. During most of 1974/75, world almond prices were down from year-earlier levels, reflecting the large supplies of most tree nuts, consumers preferences for lower priced nuts during the early part of the season, and the prospects for a large 1975 harvest. Italian shelled, unselected almonds averaged $1.01 per pound (f.o.b. Bari, Italy) during September 1975, down from $1.36 the same month a year earlier.

According to the Almond Control Board in California, shipments for the first 3 months of the new season (July 1-September 30) were substantially ahead of the same period last year, both in domestic and export markets. Good prospective domestic and foreign demand will keep U.S. grower prices from decreasing sharply. However, with large domestic and foreign tree nut supplies this season, grower almond prices for the 1975 crop are likely to average moderately below 1974.

Table 12—Seven citrus fruits: Production, use, and value, United States 1970/71 through 1974/75[1]

Fruit and season	Production[2]	Utilization of production				Value of production
		Fresh		Processed		
		Quantity	Percentage	Quantity	Percentage	
	1,000 tons	*1,000 tons*	*percent*	*1,000 tons*	*percent*	*1,000 dollars*
Oranges:						
1970/71	8,223	1,784	21.7	6,439	78.3	465,109
1971/72	8,237	1,721	21.0	6,511	79.0	549,369
1972/73	9,737	1,698	17.4	8,039	82.6	603,305
1973/74	9,386	1,778	18.9	7,608	81.1	600,891
1974/75	10,242	2,121	20.7	8,121	79.3	640,858
Grapefruit:						
1970/71	2,472	988	40.0	1,484	60.0	145,287
1971/72	2,623	1,088	41.5	1,535	58.5	185,586
1972/73	2,676	1,110	41.4	1,566	58.6	177,055
1973/74	2,692	1,130	42.0	1,562	58.0	157,673
1974/75	2,485	1,138	45.8	1,347	54.3	158,779
Lemons:						
1970/71	625	370	59.2	255	40.8	82,226
1971/72	634	365	57.6	269	42.4	80,266
1972/73	844	419	49.6	425	50.4	97,302
1973/74	676	422	62.4	254	37.6	109,851
1974/75	1,118	442	39.5	676	60.5	113,226
Limes:						
1970/71	35	16	45.7	19	54.3	4,136
1971/72	44	19	43.2	25	56.8	6,039
1972/73	44	21	47.7	23	52.3	6,710
1973/74	42	19	45.2	23	54.8	7,560
1974/75	44	20	45.5	24	54.5	8,492
Tangelos:						
1970/71	122	73	59.8	49	40.2	5,643
1971/72	162	78	48.1	84	51.9	9,900
1972/73	140	65	46.4	75	53.6	7,812
1973/74	167	72	43.1	95	569	9,250
1974/75	212	107	50.5	105	49.5	11,092
Tangerines:						
1970/71	233	162	69.5	71	30.5	18,374
1971/72	221	149	67.4	72	32.6	22,767
1972/73	223	142	63.7	81	36.3	20,729
1973/74	210	151	71.9	59	28.1	22,502
1974/75	228	159	69.7	69	30.3	23,926
Temples:						
1970/71	225	100	44.4	125	55.6	13,900
1971/72	239	81	33.9	158	66.1	15,317
1972/73	230	111	48.3	119	51.7	15,606
1973/74	239	87	36.4	152	63.6	14,840
1974/75	239	86	36.0	153	64.0	12,243
Total:						
1970/71	11,935	3,493	29.3	8,442	70.7	734,675
1971/72	12,160	3,506	28.8	8,654	71.2	869,244
1972/73	13,894	3,566	25.7	10,328	74.3	928,519
1973/74	13,412	3,659	27.3	9,753	72.7	922,367
1974/75	14,568	4,073	28.0	10,495	72.0	968,616

[1] 1974/75 preliminary. [2] Production having value.

Data prepared from citrus production and utilization reports, SRS, USDA.

Table 13—Selected citrus fruit: Use for processing by percentages of total production, 1969/70 through 1974/75

State, variety, and season	1969/70	1970/71	1971/72	1972/73	1973/74	1974/75
	Percent	*Percent*	*Percent*	*Percent*	*Percent*	*Percent*
ORANGES:						
Florida:						
Temple	45.7	55.4	66.4	52.1	63.7	64.0
Early and midseason	89.7	90.0	91.2	92.6	93.4	92.3
Valencia	91.1	90.4	92.4	93.0	93.2	92.2
Total[2]	88.7	89.0	90.9	91.6	92.4	92.3
California:						
Naval and miscellaneous	24.5	18.0	25.6	33.2	20.5	27.5
Valencia	41.0	43.6	48.7	50.4	35.7	46.3
Total	32.0	31.4	36.8	42.8	27.5	36.7
GRAPEFRUIT:						
Florida:						
Seedless	50.9	53.4	53.6	52.4	51.2	50.1
Pink	34.4	35.5	36.5	38.0	35.7	33.5
White	60.4	63.1	62.4	59.5	58.5	57.5
Other seeded	94.1	95.9	97.4	97.2	98.6	98.0
Total	61.9	65.1	63.7	62.5	61.1	57.9
Texas	39.1	41.2	37.6	46.3	49.5	36.3
TANGERINES:						
Florida	20.6	28.1	30.4	32.7	26.6	28.7
California	46.8	37.0	40.5	45.0	33.1	37.0
LEMONS:						
California	36.9	36.4	39.0	48.1	36.9	56.3
Arizona	52.4	59.4	57.5	59.4	40.2	73.3

[1] Preliminary. [2] Includes temples.

Table 14—Florida oranges used for frozen concentrate

Crop year	Florida orange and Temple production	Used for frozen concentrates		Yield per box	Frozen concentrate orange juice pack[1]
	Million boxes	*Million boxes*[2]	*Percent*	*Gallons*	*Million gallons*
1970/71	147.3	103.5	70.3	1.21	125.2
1971/72	142.3	104.4	73.4	1.29	134.2
1972/73	174.8	132.2	75.6	1.33	176.1
1973/74	171.1	132.5	77.4	1.30	171.8
1974/75	178.6	135.5	75.9	1.31	178.2

[1] 45° Brix basis and includes frozen concentrated tangerine juice used in processing. [2] Includes tangelos, temples, and honey tangerines.

Table 15—Citrus fruit: Season average equivalent returns per box received by growers, by variety and utilization, by State and total United States, 1972/73-1974/75 seasons

Variety, States and U.S.	1972/73						1973/74						1974/75					
	Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree			Equivalent P.H.D.[1]			Equivalent on-tree		
	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.	All	Fresh	Proc.
	Dol.	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*	*Dol.*
ORANGES:																		
Florida:																		
Early and midseason	2.48	2.80	2.45	1.43	1.83	1.40	2.46	3.65	2.40	1.38	2.28	1.32	2.37	3.20	2.30	1.32	2.20	1.25
Valencia	2.76	2.85	2.75	1.71	1.88	1.70	2.67	2.95	2.65	1.59	1.88	1.57	2.81	3.50	2.75	1.76	2.50	1.70
All	2.61	2.82	2.59	1.56	1.85	1.54	2.55	3.17	2.51	1.47	2.10	1.43	2.56	3.33	2.50	1.52	2.33	1.45
Temple	3.06	4.15	2.05	1.95	3.15	.85	2.80	3.85	2.20	1.64	2.75	1.00	2.31	3.65	1.55	1.18	2.65	.35
California:																		
Navel and misc.	3.52	5.15	.24	2.68	4.31	-.60	4.03	5.00	.28	2.88	3.85	-.87	3.54	4.85	.10	2.44	3.75	-1.00
Valencia	2.83	4.50	1.18	1.99	3.66	.34	3.71	5.05	1.30	2.41	3.75	.00	2.79	4.35	.99	1.59	3.15	-.21
All	3.14	4.84	.86	2.30	4.00	.02	3.88	5.02	.89	2.67	3.81	-.35	3.17	4.64	.65	2.03	3.50	-.51
U.S.[2]	2.69	4.01	2.37	1.70	3.16	1.36	2.78	4.34	2.37	1.69	3.20	1.29	2.69	4.17	2.27	1.63	3.09	1.21
GRAPEFRUIT:																		
Florida:																		
Seedless	3.01	3.85	2.24	2.22	3.11	1.40	2.68	3.39	2.00	1.75	2.54	1.00	2.83	4.09	1.57	2.02	3.34	.71
Seeded	2.42	3.24	2.40	1.63	2.50	1.61	2.16	3.00	2.15	1.31	2.15	1.30	1.82	1.82	1.80	1.02	2.15	1.00
All	2.88	3.84	2.30	2.08	3.10	1.47	2.57	3.39	2.05	1.66	2.54	1.10	2.66	4.08	1.63	1.86	3.33	.79
Texas	2.15	2.65	1.56	1.80	2.30	1.21	1.66	2.27	1.03	1.31	1.92	.68	2.30	2.90	1.25	1.95	2.55	.90
California	2.78	4.65	.94	1.95	3.78	.14	2.65	4.21	.94	1.87	3.37	.22	2.71	4.48	.77	1.96	3.72	.02
Arizona	1.87	3.05	.95	1.22	2.40	.30	2.04	3.00	.85	1.34	2.30	.15	2.10	3.40	.80	1.40	2.70	.10
U.S.	2.70	3.62	2.04	1.98	2.96	1.29	2.41	3.23	1.81	1.61	2.48	.97	2.60	3.90	1.48	1.86	3.22	.70
LEMONS:																		
California	4.47	6.65	2.11	3.07	5.25	.71	6.16	8.55	2.08	4.66	7.05	.58	4.03	8.00	1.00	2.43	6.40	-.60
Arizona	4.05	6.90	2.10	2.70	5.55	.75	6.23	9.00	2.10	4.83	7.60	.70	3.30	7.00	1.95	1.60	5.30	.25
U.S.	4.38	6.69	2.11	2.99	5.30	.72	6.17	8.62	2.08	4.69	7.14	.60	3.85	7.83	1.28	2.23	6.22	-.35
TANGERINES:																		
Florida	4.12	5.30	1.70	2.37	3.70	-.35	4.69	5.75	1.75	2.82	4.00	-.45	4.84	6.35	1.10	3.02	4.65	-1.05
California	3.74	6.45	.43	2.75	5.46	-.56	4.35	6.30	.40	3.05	5.00	-.90	3.92	5.90	.54	2.92	4.90	-.46
Arizona[3]	4.50	6.80	.45	3.35	5.65	-.70	5.08	6.70	.40	3.78	5.40	-.90	4.73	6.35	.55	3.33	4.95	-.85
U.S.	4.04	5.77	1.09	2.59	4.38	-.47	4.65	6.03	1.13	3.02	4.47	-.66	4.56	6.23	.85	3.03	4.75	-.82
TANGELOS:																		
Florida	2.52	3.30	1.85	1.39	2.20	.70	2.50	3.35	1.85	1.25	2.15	.57	2.36	3.40	1.30	1.16	2.30	.00
LIMES:																		
Florida	6.10	10.60	2.10	4.25	8.75	.25	7.20	13.45	1.95	5.10	11.35	-.15	7.72	15.25	1.60	5.62	13.15	-.50

[1] P.H.D.—Packinghouse door. [2] Excludes temples. [3] Includes tangelos.

Data from Statistical Reporting Service.

Table 16—Frozen concentrated citrus juices: Florida canners' stocks, packs, imports, supplies, and movement, current season with comparisons

Item and season	Carryin	Pack		Imports		Supply		Movement		Stocks[1]
		To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	To date[1]	Total season	
	1,000 gallons	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*
Oranges:[2]										
1971/72	22,568	134.229	134,229	9,243	11,668	166,040	168,465	120,764	140,715	45,276
1972/73	27,750	176,073	176,073	3,290	4,101	207,113	207,924	141,113	100,552	66,250
1973/74	47,372	171,846	171,846	4,369	4,599	223,587	223,817	152,055	174,956	71,532
1974/75	48,861	178,174	178,174	6,317		233,352		166,197		67,156
Grapefruit:										
1971/72	1,148	8,798	8,798	---	---	9,946	9,946	6,126	7,115	3,820
1972/73	2,831	8,658	8,658	---	---	11,489	11,489	6,919	7,908	4,570
1973/74	3,581	9,026	9,026	---	---	12,607	12,607	6,845	7,710	5,762
1974/75	4,897	7,847	7,847	---	---	12,744	12,744	7,471		5,273
Tangerine:										
1971/72	307	1,220	1,220	---	---	1,527	1,527	1,262	1,319	265
1972/73	208	1,072	1,072	---	---	1,280	1,280	1,050	1,069	230
1973/74	211	1,019	1,019	---	---	1,230	1,230	822	831	408
1974/75	399	1,147	1,147	---	---	1,546	1,546	1,065		481

[1] For the 1974/75 season, week ending October 18; 1973/74, October 19; 1972/73, October 20; and 1972/72, October 14. These respective dates include data through the 46th week of each season. [2] Unadjusted "Movement" data "To date" through 1973/74 are shown as reported by Florida Canners Association.

Source: Florida Canners Association.

Table 17—Chilled citrus products: Packs, stocks, supply, and movement, Florida, 1970/71 through 1974/75

Item and season[1]	Beginning stocks	Pack[2]	Total supply	Season movement	Ending stocks
	1,000 gallons	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*	*1,000 gallons*
Orange juice, s.s.:					
1970/71	14,480	112,388	126,868	112,090	14,778
1971/72	14,778	116,970	131,748	111,756	19,992
1972/73	19,992	125,683	145,675	127,255	18,420
1973/74	18,420	135,313	153,733	137,347	16,386
1974/75	16,386	154,478	170,864	154,085	16,779
Grapefruit juice, s.s.:					
1970/71	369	12,949	13,318	12,394	924
1971/72	924	17,358	18,282	15,261	3,021
1972/73	3,021	16,071	19,092	16,871	2,221
1973/74	2,221	17,377	19,597	17,916	1,681
1974/75	1,681	20,535	22,216	20,768	1,448
Grapefruit sections:					
1970/71	532	2,038	2,570	1,976	594
1971/72	594	1,784	2,378	2,057	321
1972/73	321	2,051	2,372	1,989	383
1973/74	383	1,894	2,277	1,836	441
1974/75	441	1,634	2,075	1,737	338
Orange sections:					
1970/71	677	962	1,639	968	671
1971/72	671	819	1,490	1,063	427
1972/73	427	804	1,231	945	286
1973/74	286	765	1,051	804	247
1974/75	247	791	1,038	920	118
Citrus salad:					
1970/71	1,084	4,535	5,619	4,644	975
1971/72	975	3,822	4,797	4,485	312
1972/73	312	4,818	5,130	4,349	781
1973/74	781	4,268	5,049	4,163	886
1974/75	886	3,465	4,351	3,724	627

[1] Season beginning October 1, approximately. [2] Packs of chilled juices include products of fresh fruit and frozen concentrate and exclude reprocessed single strength bulk.

Prepared from reports of Florida Canners' Association.

Table 18—Canned citrus juices and fruit: Florida canners' stocks, packs, supplies, and movement, current season with comparisons

Item and season	Beginning stocks	Pack	Supply	Movement	Ending stocks
	1,000 cases, 24 No. 2's	*1,000 cases, 24 No. 2's*	*1,000 cases, 24 No. 2's*	*1,000 cases, 24 No. 2's*	*1,000 cases, 24 No. 2's*
Juices[2]					
Orange:					
1970/71	1,113	11,749	12,862	11,532	1,330
1971/72	1,330	10,942	12,272	10,477	1,795
1972/73	1,795	13,670	15,465	12,578	2,887
1973/74	2,887	10,885	13,772	11,133	2,639
1974/75	2,639	10,737	13,376	11,349	2,027
Grapefruit:					
1970/71	819	19,366	20,185	18,580	1,605
1971/72	1,605	21,173	22,778	18,468	4,310
1972/73	4,310	19,059	23,369	19,166	4,203
1973/74	4,203	20,576	24,779	18,780	5,999
1974/75	5,999	15,951	21,950	18,129	3,821
Grapefruit reconstituted:					
1970/71	15	1,160	1,175	942	-233
1971/72	233	520	753	600	153
1972/73	153	279	432	405	27
1973/74	27	160	187	153	34
1974/75	34	443	477	391	86
Blend:					
1970/71	299	2,214	2,513	2,114	399
1971/72	399	1,832	2,231	1,904	327
1972/73	327	1,898	2,225	1,823	402
1973/74	402	1,782	2,184	1,702	482
1974/75	482	1,493	1,975	1,699	276
Tangerine:					
1970/71	22	35	57	39	18
1971/72	18	16	34	31	3
1972/73	3	24	27	20	7
1973/74	7	18	25	19	6
1974/75	6	12	18	17	1
Canned fruits:					
Grapefruit sections:					
1970/71	720	3,506	4,226	3,560	666
1971/72	666	2,752	3,418	2,978	440
1972/73	440	2,687	3,127	2,804	323
1973/74	323	3,027	3,350	2,645	705
1974/75	705	2,236	2,941	2,027	914
Orange sections:					
1970/71	6	20	26	14	12
1971/72	12	8	20	14	6
1972/73	6	18	24	17	7
1973/74	7	17	24	15	9
1974/75	9	18	27	19	8
Citrus salad:					
1970/71	91	228	319	244	75
1971/72	75	269	344	200	144
1972/73	144	131	275	203	72
1973/74	72	117	189	158	31
1974/75	31	206	237	152	85

[1] Season beginning October 1. [2] Single strength.

Compiled from Florida Canners Association reports.

Table 19—Canned noncitrus fruit and juice: Canners' carryin, pack, supplies, and shipments, current season with comparisons

Item and season[1]	Carryin	Pack	Total supply	Total season shipments
		1,000 equivalent cases, 24 No. 2½'s		
Apricots:[2]				
1971/72	1,696	3,262	4,958	4,397
1972/73	561	3,041	3,602	3,304
1973/74	298	4,094	4,392	3,925
1974/75	467	1,987	2,454	2,218
1975/76	236	4,421	4,657	
Cherries, RSP:				
1971/72	102	1,041	1,143	900
1972/73	243	1,299	1,542	1,533
1973/74	9	579	588	583
1974/75	5	1,188	1,193	1,135
1975/76	58	1,273	1,331	
Cherries, sweet:				
1971/72	388	536	924	609
1972/73	315	393	708	518
1973/74	190	503	693	566
1974/75	127	623	750	460
1975/76	290	412	702	
Pineapple:				
1971/72	7,787	17,705	25,492	16,829
1972/73	8,663	16,540	25,203	18,191
1973/74	7,012	14,981	21,993	16,804
1974/75	5,189	13,913	19,102	14,297
1975/76	4,805			
		1,000 equivalent cases, 24 No. 2's		
Canned juice:				
Single strength pineapple:				
1971/72	5,300	13,641	18,941	12,836
1972/73	6,105	12,328	18,433	14,334
1973/74	4,099	11,350	15,449	11,601
1974/75	3,848	8,448	12,296	9,569
1975/76	2,727			
		1,000 equivalent cases, 6 No. 10's		
Conncentrated pineapple:				
1971/72	779	1,420	2,199	1,188
1972/73	1,011	1,080	2,091	1,176
1973/74	915	1,540	2,455	1,653
1974/75	802	1,126	1,928	1,209
1975/76	719			

[1] Season beginning July 1 for RSP cherries and June 1 for all other items. [2] California only.

Prepared from reports of National Canners Association, Canners League of California, and Pineapple Growers Association of Hawaii.

Table 20—U.S. wholesale prices of selected dried and frozen fruit items, by months, 1971-75

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
	Dollars per cases	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*	*Dollars per cases*
DRIED FRUIT:												
Prunes												
(24-1 lb. pkg.):												
1971	7.546	7.546	7.464	7.383	7.383	7.383	7.383	7.301	7.383	7.464	7.464	7.546
1972	7.546	7.464	7.513	7.791	7.954	8.036	8.363	8.069	8.150	9.130	9.277	9.604
1973	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604	9.604
1974	9.604	9.604	9.604	9.653	9.653	9.653	9.653	9.653	9.653	9.571	9.571	9.571
1975	9.571	9.571	9.571	9.490	9.049	9.049	8.575	8.575	8.575			
Raisins												
(24-15 oz. pkg.):												
1971	5.914	5.914	5.944	5.944	5.944	5.944	5.963	5.963	5.988	5.988	5.988	6.037
1972	6.086	6.145	6.145	6.885	7.424	7.424	7.424	7.080	7.081	8.220	9.371	9.494
1973	9.609	9.609	9.996	10.119	10.119	10.315	10.315	10.315	10.437	11.564	11.618	12.108
1974	12.120	12.157	12.218	12.446	12.446	12.446	12.397	12.287	12.287	11.772	11.772	11.772
1975	11.650	11.650	11.650	11.527	11.282	11.282	11.282	11.282	11.282			
FROZEN FRUIT:												
Strawberries												
(12-10 oz. pkg.):												
1971	2.885	2.885	2.885	2.885	2.885	2.885	2.960	3.003	3.003	3.003	3.003	3.003
1972	3.052	3.052	3.052	3.052	3.052	3.052	3.245	3.245	3.326	3.357	3.388	3.388
1973	3.388	3.388	3.413	3.413	3.413	3.510	3.510	3.651	3.651	3.783	3.783	3.847
1974	3.847	3.888	3.888	3.888	3.888	3.888	4.087	4.091	4.219	4.219	4.219	4.219
1975	4.219	4.219	4.219	4.218	4.218	4.218	4.218	4.218	4.218			
FROZEN JUICE:												
Orange, conc.												
(12-6 oz. cans):												
1971	1.651	1.693	1.777	1.770	1.951	1.992	2.049	2.106	2.106	2.106	2.106	2.106
1972	2.106	2.106	2.106	2.106	2.159	2.159	2.159	2.159	2.159	2.159	2.159	2.159
1973	2.159	2.159	2.159	2.159	2.106	2.159	2.106	2.106	2.106	2.159	2.159	2.159
1974	2.167	2.152	2.152	2.152	2.152	2.152	2.151	2.151	2.170	2.195	2.134	2.154
1975	2.244	2.254	2.254	2.254	2.254	2.254	2.246	2.246	2.246			

Source: Bureau of Labor Statistics, U.S. Department of Labor.

Table 21—U.S. monthly average price indexes for fruit

Item	1974					1975								
	Annual	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
	(1967=100)													
Wholesale price index:														
Fresh fruit	144.0	148.7	151.7	164.2	157.0	148.7	153.1	161.8	167.4	167.7	185.7	163.0	154.1	151.3
Citrus fruit	131.4	147.6	139.9	129.9	128.6	129.6	130.3	127.6	132.2	143.1	150.2	141.8	145.9	127.1
Other fruit	146.3	149.1	155.8	176.5	167.2	155.5	161.2	174.0	179.9	176.4	198.3	170.6	156.9	159.9
Dried fruit	247.3	253.3	226.7	223.8	222.6	222.6	220.5	219.7	210.9	210.9	211.7	210.4	212.4	212.4
Canned fruit and juice	159.7	172.6	174.5	174.7	174.8	175.2	174.8	175.1	174.7	175.7	175.1	174.0	173.5	172.9
Canned fruit	152.6	167.3	170.2	170.5	170.4	170.4	170.2	170.4	170.1	171.0	170.9	168.7	167.2	166.0
Canned fruit juice	172.8	182.4	182.4	182.4	182.8	184.1	183.2	183.7	183.1	184.3	183.0	183.7	185.3	185.9
Frozen fruit and juice	144.0	145.8	147.0	149.5	150.5	154.8	155.2	155.2	155.2	155.2	155.2	154.9	154.9	154.9
Consumer price index:														
Fresh fruit	150.8	160.1	156.7	148.5	143.1	146.3	150.5	153.4	162.7	169.1	180.6	187.1	179.1	164.0
Index of fruit prices received by growers[1]	143	153	160	138	127	135	132	140	141	154	161	161	147	157

[1] Index for fresh and processed.

Table 22—U.S. monthly average fruit prices received by growers

Commodity and unit	1974				1975								
	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
Apples for fresh use (cents/lb.)	12.30	11.40	10.70	10.20	9.80	9.90	11.30	11.00	14.50	15.30	14.40	11.90	11.70
Pears for fresh use, ($/ton)	197.00	185.00	186.00	183.00	154.00	146.00	135.00	166.00	158.00	---	300.00	186.00	157.00
Peaches for fresh use (cents/lb.)	12.30	---	---	---	---	---	---	---	---	21.60	19.00	16.20	14.80
Strawberries for fresh use (cents/lb.)	33.00	32.30	---	---	52.50	43.50	48.50	42.50	33.40	35.60	35.40	35.10	38.10
Oranges for: ($/box)[1]													
Fresh use	4.25	5.07	2.96	2.71	2.58	3.05	2.90	2.63	3.03	3.65	3.36	2.69	3.90
Processing	---	---	.78	1.00	1.17	1.15	1.26	1.35	1.62	1.63	1.54	-.21	-.21
All	2.67	3.65	1.83	1.43	1.29	1.34	1.49	1.61	1.80	1.86	1.90	1.37	2.02
Grapefruit for: ($/box)[1]													
Fresh use	2.99	3.12	2.86	2.73	2.82	2.93	3.17	3.49	4.11	3.92	4.36	3.33	2.82
Processing	-.37	-.44	.69	.76	.87	.81	.85	.87	.75	.01	-.04	-.01	.06
All	.90	2.22	1.49	1.77	1.69	1.70	1.72	1.77	2.39	1.13	1.61	2.40	2.08
Lemons for: ($/box)[1]													
Fresh use	7.00	9.74	4.06	3.03	4.92	3.80	4.33	4.69	5.30	6.20	6.35	7.45	11.85
Processing	.70	.70	.33	.33	.31	-.09	-.09	-.08	-.08	-.08	-.83	-.83	-.83
All	4.80	4.97	1.43	.91	1.31	.85	1.39	1.86	2.34	3.09	2.87	4.89	8.28
Tangerines for: ($/box)[1]													
Fresh use	---	8.10	7.72	3.58	3.21	4.66	4.43	4.90	5.02	---	---	---	---
Processing	---	-1.65	-.87	-.99	-1.03	-.62	-.51	-.47	-.63	---	---	---	---
All	---	7.33	5.37	2.49	1.70	2.56	2.95	3.09	3.62	---	---	---	---

[1] Equivalent on-tree returnns.

Table 23—Fresh fruit: Retail prices, marketing margin, and grower and packer return per pound, sold in New York City, seasonal average, 1972/73-1974/75

Commodity and season	Retail price (cents)	Marketing margin		Grower and packer return[1] (f.o.b. shipping point price)[2]	
		Cent	Percentage of retail price	Cents	Percentage of retail price
Apples, Eastern Delicious:					
1974/75	31.9	13.7	43	18.2	57
1973/74	32.6	16.3	50	16.3	50
1972/73	25.5	9.1	36	16.4	64
Apples, Eastern McIntosh:					
1974/75	33.7	21.3	63	12.4	37
1973/74	36.0	17.1	48	18.9	52
1972/73	28.0	15.9	57	12.1	43
Apples, Western Delicious:					
1974/75	43.0	22.6	53	20.4	47
1973/74	39.9	24.4	61	15.5	39
1972/73	38.6	20.8	54	17.8	46
Grapes, Thompson Seedless:					
1974	75.6	45.9	61	29.7	39
1973	63.7	37.9	59	25.8	41
1972	61.1	33.2	54	27.9	46
Lemons, Western:					
1974/75	40.5	24.1	59	16.4	41
1973/74	41.7	24.8	59	16.9	41
1972/73	36.7	22.5	61	14.2	39
Oranges, California Navel:					
1974/75	30.0	19.8	66	10.2	34
1973/74	27.2	17.4	64	9.8	36
1972/73	29.3	19.1	65	10.2	35
Oranges, California Valencia:					
1974	26.7	16.6	62	10.1	38
1973	26.1	16.5	63	9.6	37
1972	25.1	17.0	68	8.1	32
Oranges, Florida:					
1974/75	17.8	12.0	67	5.8	33
1973/74	18.4	12.7	69	5.7	31
1972/73	16.0	10.6	66	5.4	34

[1] For quantity of product equivalent to retail unit sold to consumers: Because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. [2] Production area and season: Apples, Eastern Delicious-*New York State* (Oct.-May); Apples, Eastern McIntosh-*New York State* (Nov.-May); Apples, Western Delicious-*Washington* (Oct.-June); Grapefruit-*Florida* (Nov.-Apr.); Grapes-*California* (July-Oct.); Lemons-*California* (Aug.-July); *California*-Navel Oranges (Dec.-May); *California* Valencia Oranges (May-Nov.); *Florida* Oranges-(Nov.-May).

Table 24—U.S. exports of selected dried fruits and tree nuts by destination, 1970/71-1975/76 seasons

Item and season[1]	Canada	Europe				Other	Total
		United Kingdom	Original EC[2]	Other	Total		
	Tons	*Tons*	*Tons*	*Tons*	*Tons*	*Tons*	*Tons*
Prunes:							
1970/71	3,923	4,679	12,476	8,517	25,672	6,239	35,834
1971/72	5,502	5,196	16,274	11,834	33,304	6,502	45,308
1972/73	4,190	3,194	14,213	8,533	25,940	4,457	34,587
1973/74	5,584	6,252	23,893	15,090	45,235	8,388	59,207
1974/75	5,238	4,051	18,980	12,130	35,161	7,170	47,569
Raisins:							
1970/71	6,408	10,163	5,738	11,920	27,821	28,222	62,451
1971/72	6,460	10,442	7,997	15,852	34,291	33,392	74,143
1972/73	4,454	1,808	3,674	6,087	11,569	7,353	23,376
1973/74	6,447	6,827	6,189	12,827	25,843	17,540	49,830
1974/75	7,956	7,383	6,284	9,907	23,574	23,817	55,347
Apricots:							
1970/71	62	2	103	171	276	186	524
1971/72	176	4	116	140	260	173	609
1972/73	143	15	155	282	452	324	919
1973/74	160	---	252	335	587	172	919
1974/75	143	---	63	136	199	245	587
Shelled almonds:							
1970/71	1,084	1,722	10,493	7,190	19,405	7,284	27,773
1971/72	1,506	3,121	17,842	7,808	28,771	8,493	38,770
1972/73	1,119	2,132	10,895	4,397	17,424	8,814	27,357
1973/74	1,408	3,688	12,606	4,769	21,063	11,595	34,066
1974/75	1,236	3,398	24,826	9,178	37,402	9,398	48,036
1974/75 thru Aug.	43	66	918	185	1,169	69	1,281
1975/76 thru Aug.	44	358	2,050	1,076	3,484	713	4,241
Unshelled walnuts:							
1970/71	1,295	1,064	1,838	1,093	3,995	1,821	7,111
1971/72	1,509	1,114	5,706	2,672	9,492	2,268	13,269
1972/73	1,441	250	4,401	2,643	7,294	3,119	11,854
1973/74	1,706	898	10,703	5,686	17,287	3,281	22,274
1973/74 thru Aug.	1,351	826	10,230	4,539	15,595	3,222	20,168
1974/75 thru Aug.	1,419	295	12,136	6,129	18,560	3,738	23,717

[1] Season beginning September 1 for prunes and raisins, August 1 for almonds, October 1 for walnuts, and July 1 for apricots.

[2] Belgium-Luxembourg, France, West Germany, Italy and Netherlands.

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